Economic Development Analysis

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ECONOMIC DEVELOPMENT

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EXECUTIVE SUMMARY

The City of Coeur d'Alene is well known for its surrounding beauty and natural environment, which has established it as a successful tourist and retirement destination. However, the year-round residents want a diverse and sustainable economy that will serve the entire community. There is a desire for more industries in addition to tourism. They especially want to focus on more educational partnerships to enhance opportunities for the existing residents, and provide opportunities for the youth to return to viable careers. Fortunately, Coeur d'Alene has many assets that will help achieve the economic development vision of the community. The following analysis outlines how these assets can be leveraged and developed to achieve the desired direction.

BACKGROUND

The City of Coeur d'Alene is updating the Comprehensive Plan, and one objective of the Plan is to strategically prepare for land use and infrastructure investments that will support economic development across the City. This document provides an overview of economic development trends, City demographics, Coeur d'Alene's industry strengths, and anticipated areas of employment growth. Recommendations are based on data research and interviews with economic development and tourism stakeholders, business owners, government officials, and real estate professionals across the community.

A strong economic development analysis must be devised by and for the community it serves. While looking at national and state trends and conducting a data analysis are important to determining trends, assets, and challenges, soliciting input from local businesses and community members gives this analysis much-needed context. By providing a platform for community members and business leaders to share their lessons and new ideas, we hope to generate a universal understanding among public, private, and governmental partners. To identify Coeur d'Alene's economic development priorities, the following five steps were followed:

Examine national and state trends. Discuss with stakeholders the current national trends driving economic development and how they align with local development priorities and trends.

Benchmark and compare the City to its peers. Provide quantitative data regarding the community profile and demographics to establish a foundation of existing conditions. This data is contrasted with peer communities to provide context.

Conduct Discussions. For a strategy to be inclusive – for the community, by the community – diverse voices and perspectives must be brought to the table. Extensive outreach in person via five stakeholder meetings, a digital survey, and community feedback on preliminary recommendations at an open house provided a variety of perspectives.

Identify Key Themes. It is essential that areas for investment and growth are built upon shared principles and community values that are conveyed through survey responses and stakeholder

meeting feedback. Consistent messages create key themes of focus and direction that are unique to the community.

Develop Goals and Objectives. By developing a "playbook" of direction that includes priority goals and objectives, the City can identify where they should focus time and monetary resources to most effectively foster business growth and expansion.

ECONOMIC DEVELOPMENT OVERVIEW

In preparing an economic development analysis, it is important to have a common understanding of terminology and desired outcomes. This section provides the foundational background that informs the final recommendations.

Economic development can be defined as efforts that seek to improve the economic well-being and quality of life for a community by creating and/or retaining middle and high-income jobs and supporting or growing incomes and the tax base through diversification of the local economy. These jobs are generally defined as two different categories with distinct needs in terms of workforce and business location. In addition, these sectors require different types of support and investments from various stakeholders. These sectors are distinguished for clarification regarding strategy objectives and actions.

TRADED SECTOR VS. LOCAL SECTOR JOBS

Traded sector (also referred to as an export or basic sector) businesses include industries and employers which produce goods and services that are consumed outside the region where they are produced and therefore bring in new income to the area (e.g., metals and machinery, food processing). Workers in the traded sector tend to have higher educational attainment, work more hours, and earn higher average wages than local sector business.

As the traded sector increases employment and wages, it also fosters an environment that allows entrepreneurs to develop skills and resources while on the job that may encourage them to start a new business and increase employment opportunities within the region. Furthermore, certain traded sector companies foster a supply chain effect that creates the need for additional companies to supply components of a product that is manufactured.

Local sector business consists of industries and firms that are in every region. They produce goods and services that are consumed locally in the region where they were made, and therefore circulate existing income in the area (e.g., breweries, physician offices, banks). These businesses are important as they make a community distinct and provide amenities to attract young professionals and families that drive the new economy. A sampling of traded vs. local sector businesses in the City of Coeur d'Alene is indicated in Table 1.

Table 1. Representative Traded Sector and Local Sector Coeur d'Alene Businesses

The following table highlights the average wage difference between traded sector jobs and local sector jobs across the United States. As the job base expands, a community is more attractive to employees because they have more options for career growth. In turn, once the employment base grows, competition will occur and ultimately increase wages. Highlighting the strength of traded-sector jobs, the US employment base currently consists of 36% traded-sector jobs, which has 50% of the income[1].

Table 2. Annual Average Wage Comparison, USA, 2018

NAICS	Industry	US Average Annual Wage 2018
TRADED SECTOR		
55	Management of Companies and Enterprises	$85,430
54	Professional, Scientific, and Technical Services	$83,370
51	Information	$76,990
42,48-49	Wholesale Trade, Transportation and Warehousing	$53,340
31-33	Manufacturing	$53,020
11	Agriculture, Forestry, Fishing	$32,300
LOCAL SECTOR		
23	Construction	$55,290
71	Arts, Entertainment, and Recreation	$37,810
44-45	Retail Trade	$33,720
72	Accommodation and Food Services	$26,890

Source: Bureau of Labor Statistics, QCEW data

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[1] US Cluster Mapping

TARGET INDUSTRY CLUSTERS

A cluster is a geographic concentration of related industries in a particular location. Clusters are a foundational element to regional economies, making them uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support. Various cities across the US have unique clusters making them distinct: Boston, MA has biotech whereas Spartanburg, SC has textiles. Industry clusters function on a regional metropolitan statistical area (MSA) level because assets such as workforce and transportation infrastructure are not constrained by local municipal boundaries. Therefore, in order to effectively grow an industry cluster, it is important to leverage existing assets and collaborate on a regional and state level.

An industry cluster is comprised of the following elements, with some being more important than others depending on the industry. A city plays the important of role of providing the necessary infrastructure and zoned land to allow various types of industry to thrive.

Figure 1. Elements of an Industry Cluster

Higher Education
- Degree programs tied to industry
- R&D spurring innovation tied to industry
- Strong commercialization and tech transfer focus

Infrastructure
- Physical: roads, utility availability
- Digital: broadband
- Sites: Buildings and sites where talent and business wants to go

Industry
- LQ over 1.0 that shows there is substantive base of industry
- Robust supply chain

Talent Base
- Robust workforce at all levels
- Strong local training programs tied to cluster

Source: Bridge Economic Development

IMPORTANCE OF TALENT

The national economy is becoming increasingly more talent/knowledge-based than resource-based, meaning that people, rather than raw materials, are the most important asset to a company's value and prospects for growth. This applies to all industries, including manufacturing, professional services, and technology. This is not to suggest that Coeur d'Alene needs to focus their industrial base entirely on technology companies, but to understand that the modern economy depends upon highly skilled people to thrive. For this reason, a company's number one priority today is attracting talent. Verifying

this is the Duke Fuqua School of Business CFO Global Business Outlook Survey[2]. The school has conducted the survey 95 consecutive quarters since July 1996. The years 2017 -2019 are the first time that CFO's cited attracting and retaining qualified employees was their number one concern over other factors such as input costs or regulations.

A significant cohort of the talent in demand consists of the "millennial" generation (generally ages 23 to 39 in 2020), made up of approximately 76 million people – the largest demographic group our country has seen. As this generation shapes our talent-based economy, it is important to understand what motivates them and the communities they choose in such a highly mobile environment. This desired talent is attracted to a great place with jobs. Such an environment includes the following elements:

Job Base Talent moving to a new community wants to know that there are other opportunities if the job that brought them there does not fulfill expectations.

Simple Commute Many millennials are not defined by the automobile, and do not want to drive if they don't have to. As reported in Urban Land Institute (ULI) Emerging Trends 2016, miles traveled by car for those people 34 years old or younger are down 23 percent nationally. The American Automobile Association reports that the percentage of high school seniors with driver's licenses declined from 85 percent to 73 percent between 1996 and 2010, with federal data suggesting that the decline has continued since 2010.

Housing Options All talent, including millennials, desire affordable housing near employment. In order to maximize opportunities for talent attraction and retention is important for communities to provide a variety of options to meet a diversity of population needs.

Urban Environment Almost all talent, including millennials, prefer an environment with housing options, amenities, density with alternative transportation modes and retail near the work place. This urban lifestyle does not mean that an entire community must conform to urban densities. What is important is that some element of an urban lifestyle through either a healthy Main Street in a traditional downtown or denser town centers in suburbs is provided. Global commercial real estate firm Newmark Knight Frank (NKF) recently recognized that "office property owners who create a 'best of both worlds' environment by offering options to work/live/play in a walkable setting stand to capitalize the most. Corporate occupiers should keep this in mind and consider locations that offer urban amenities in a suburban setting—a blend of the active environment and convenience that today's workers, including millennials, prize"[3].

Amenities Millennials are looking for ample amenities, especially restaurants and access to outdoor recreation.

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[2] https://www.cfosurvey.org/
[3] Population Data Suggests a Suburban Office Rebound Is Coming, Newmark Knight Frank, November 2018

Diversity Millennials embrace social or ethical causes[4] and communities that are more diverse, accepting, and open to change.

THE CITY'S ROLE

A municipality does not create jobs. It creates a great environment so that business can easily invest and create jobs. With that understanding, the City should focus on the following elements to promote economic development.

Sites and Infrastructure Businesses need to go into buildings and develop on sites with adequate infrastructure. Furthermore, similar types of businesses like to physically group together to build a destination and allow for collaboration. Where an employer locates depends on the industry. Software is dependent on highly-skilled talent and will locate where talent wants to be. In addition, because of the lower capital investments and less dependence on transporting finished products, they can afford higher rents that allow them to locate in more urban/downtown locations. In contrast, manufacturing, while also needing talent, must consider access to transportation infrastructure and lower land and building costs to off-set capital equipment investment costs. Additionally, some manufacturing is dependent on rail infrastructure to lower operational costs. Aligning industry clusters with available subareas (sites with appropriate infrastructure) is an important role for the City to convey genuine support for economic growth.

Focus on Current Residents As the community makes significant commitments to land use designations and infrastructure funding, it is important to make sure that the existing residents and businesses also benefit. Coeur d'Alene should support and promote programs that allow existing residents to start their own businesses or gain skills that improve opportunities to work at expanding companies. As indicated in the following figure, the majority of job growth across the United States comes from local start-ups and expansions of existing businesses. This is not to say business attraction is not important, however it should be done strategically in balance with retaining and growing existing businesses in the region.

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[4] Brookings Institution, 11 Facts about the Millennial Generation, June 2014

Figure 2. Sources of Job Growth Across the United States
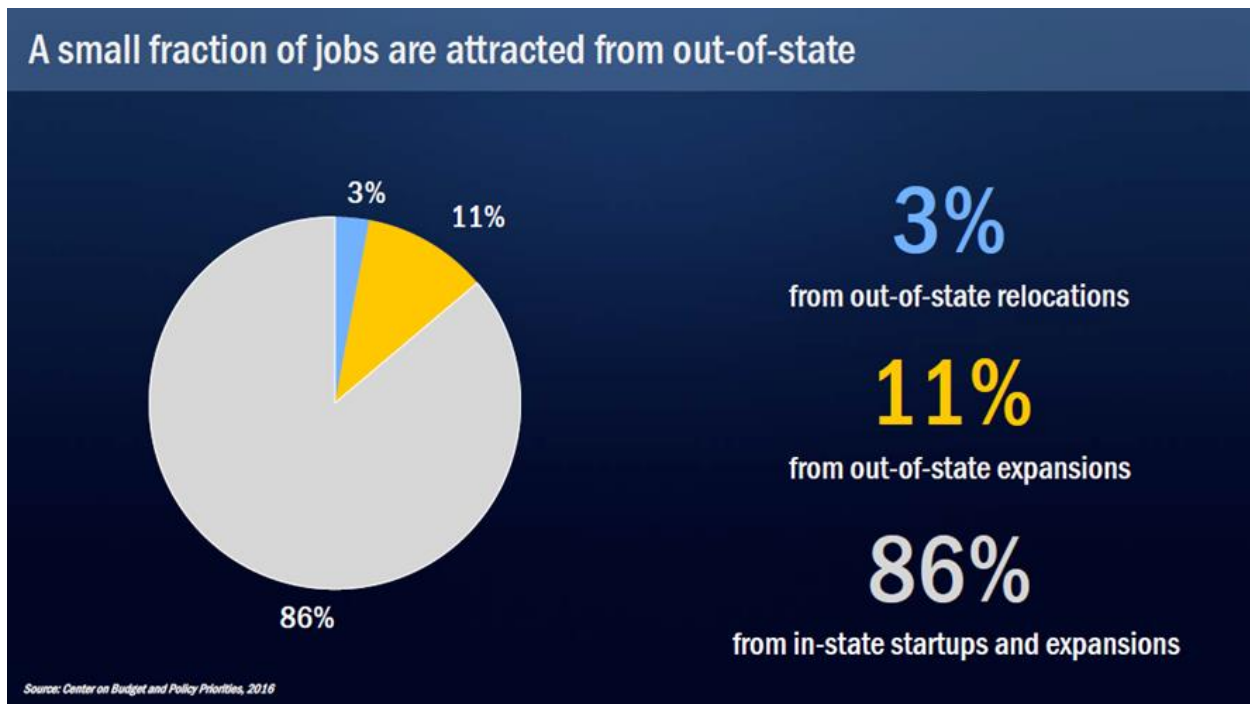
Source: Brookings, 2018

CITY PROFILE AND TRENDS

Demographic and economic statistics for a single place are unhelpful for strategy development unless presented in the context of meaningful comparisons. The following information presents data pertaining to Coeur d'Alene in contrast it with others cities likely to be in similar economic situations. The following information is a summary of the more detailed information regarding the peer cities is provided in Attachment A.

DEMOGRAPHICS

Located in Kootenai County, Idaho, Coeur d'Alene is the largest community in the county and the key economic center. The following outlines the key takeaways from the analysis of Coeur d'Alene's demographics:

Growing Population As of 2017, nearly 49,000 residents call Coeur d'Alene, home, a 7.9% increase since 2013 – a gain of 3,600 residents.

Older Population As communities outline their future economic development priorities, millennial talent is coveted as they are the future workforce. Coeur d'Alene's median age is 36.4, ranking it as the second oldest city among the benchmarks. Millennials make up 24% of the city's population – ranking 10th among the benchmark communities. The city's Millennial population has increased 5.8%,

slightly faster than the U.S. average but much slower than peer benchmarks such as Bend, Castle Rock, Boulder, and Bozeman.

Figure 3: Median Age, 2017
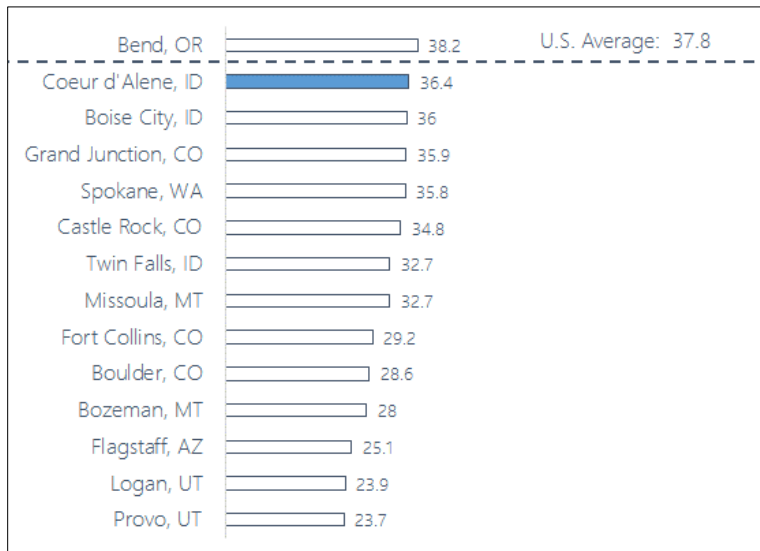
Source: U.S. Census American Community Survey 2017

Diversity Strong demographic diversity creates stronger innovation and global linkages, and creates more resilience and adaptability within a community. The Census Bureau does not categorize Hispanic/Latino as "Race" but rather as an origin. Therefore, the Hispanic/Latino population is categorized across races and is called out separately. Approximately 2,600 Coeur d'Alene residents are Hispanic (5.3% of the population) – ranking third from the bottom of the benchmark cities. Since 2013, Coeur d'Alene's Hispanic population has increased just 3%, compared to 11% for the U.S. average. Just 2.3% of Coeur d'Alene residents are foreign-born, ranking last among the benchmark cities.

Figure 4: Racial and Ethnic Breakdown, 2017
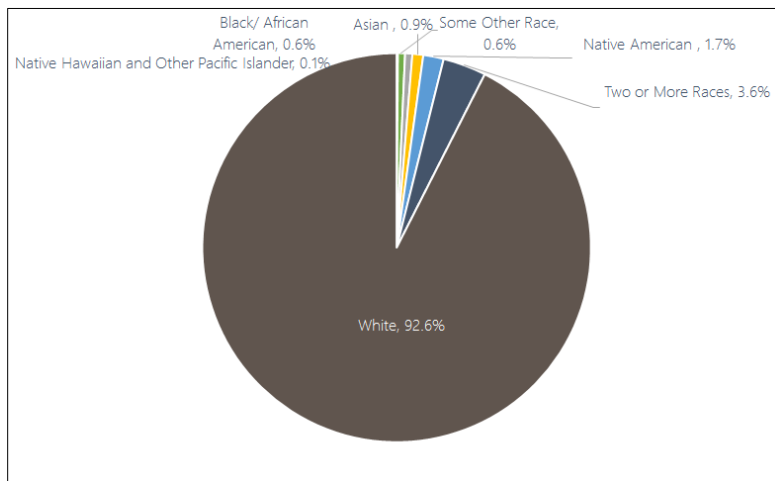
Source: U.S. Census American Community Survey 2017

Figure 5: Hispanic Population (Share of Residents), 2017

Flagstaff, AZ	19.4%
Grand Junction,...	17.0%
Provo, UT	16.3%
Twin Falls, ID	16.1%
Logan, UT	15.1%
Fort Collins, CO	11.8%
Castle Rock, CO	10.2%
Boulder, CO	9.3%
Bend, OR	9.1%
Boise City, ID	8.7%
Spokane, WA	6.2%
Coeur d'Alene,...	5.3%
Missoula, MT	3.1%
Bozeman, MT	2.8%

U.S. Average: 17.6%
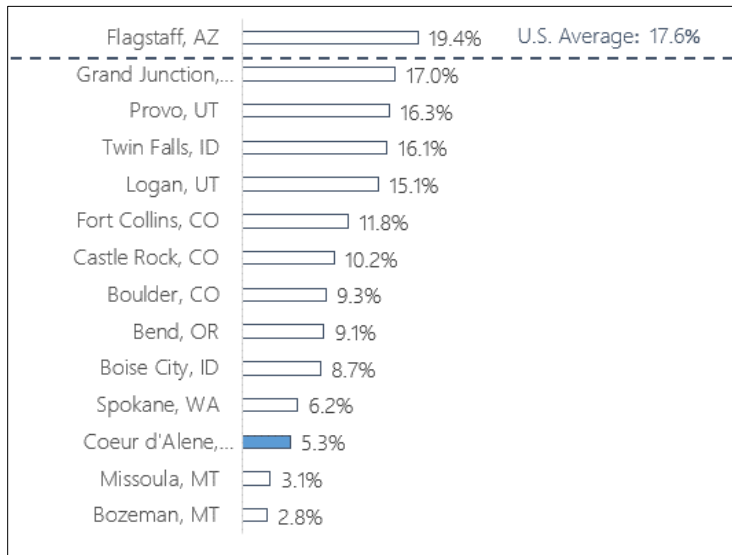
Source: U.S. Census American Community Survey 2017

Figure 6: Foreign Born Population (share of residents), 2017

U.S. Average: 13.4%

Boulder, CO	11.2%
Logan, UT	10.5%
Provo, UT	10.5%
Twin Falls, ID	9.9%
Boise City, ID	7.0%
Fort Collins, CO	6.4%
Spokane, WA	6.2%
Flagstaff, AZ	6.1%
Grand Junction,...	5.0%
Castle Rock, CO	4.5%
Bend, OR	4.4%
Bozeman, MT	4.1%
Missoula, MT	3.0%
Coeur d'Alene,...	2.3%
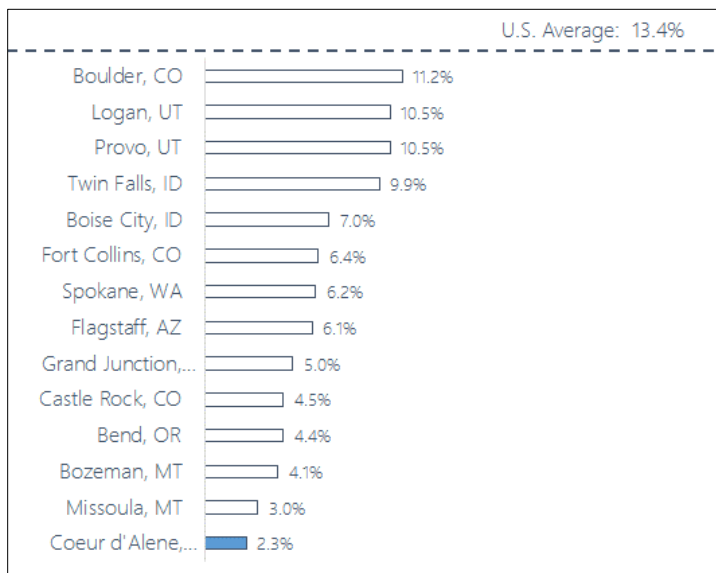
Source: U.S. Census American Community Survey 2017

INCOME

Coeur d'Alene's residents have experienced ups and downs as it relates to median household income, family income, and individual wages. This can be attributed to the City's dependence on hospitality, tourism and local retail sectors, which can be highly cyclical and dependent on other sectors of the economy. The following are key takeaways about Coeur d'Alene's various income metrics based on 2017 U.S. Census American Community Survey data:

Median Household Income Coeur d'Alene's median household income has increased 18% (nearly 2x the U.S. average) since 2013 to approximately $47,606. This represents the largest increase for all benchmark cities.

Per Capita Income Coeur d'Alene's per capita income of $20,743 is 15% less than the national average and ranks ninth among the benchmark cities (on par with Spokane and Flagstaff).

Average Family Income Coeur d'Alene's average family income increased 19.3% (ranking first among cities) since 2013 to $43,806. This income level is still nearly 15% less than the U.S. average.

Individual Wages: Men versus Women Men working full-time in Coeur d'Alene earn approximately $43,800, ranking tenth among the benchmark cities. Women working full-time in Coeur d'Alene earn nearly $35,400 annually – 15% less than the U.S. average. This ranks tenth among the benchmarks.

INCLUSIVE PROSPERITY

As the Coeur d'Alene grows in population and income, it is important to understand if everyone is benefiting. Noted previously, Coeur d'Alene as a vacation destination is highly dependent on the hospitality and tourism sector. With this sector, low-wage service work is often main type employment that is available, leaving many residents living below the poverty-line without health insurance and needing to seek out government support to supplement incomes.

Poverty Levels Coeur d'Alene's poverty levels are above the U.S. average: 12.4% of all families live below the poverty line and 20.5% of those with children. This ranks the city third highest among the benchmark cities.

Figure 7: Share of Families with Children Living Below the Poverty Line, 2017

City	Percentage
Logan, UT	24.4%
Grand Junction, CO	21.6%
Coeur d'Alene, ID	20.5%
Spokane, WA	20.4%
Twin Falls, ID	18.0%
Provo, UT	16.9%
Missoula, MT	16.9%
Flagstaff, AZ	16.5%
Boise City, ID	13.4%
Bend, OR	10.2%
Bozeman, MT	9.8%
Fort Collins, CO	9.1%
Boulder, CO	7.5%
Castle Rock, CO	3.9%

U.S. Average: 16.7%
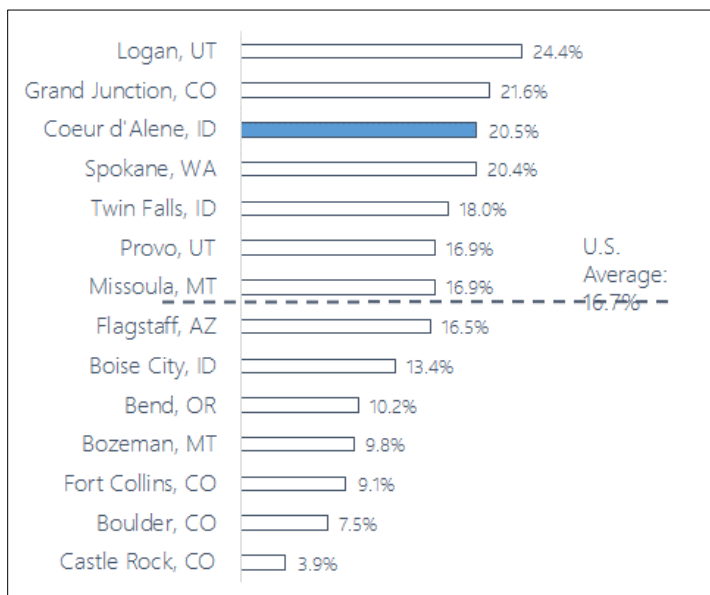
Source: U.S. Census American Community Survey 2017

Health Insurance Nearly 13% of Coeur d'Alene's population does not have health insurance. This ranks third among the benchmarks.

Cash Public Assistance Five percent of Coeur d'Alene's population receives cash public assistance; this is two times the U.S. average.

SNAP and Food Stamp Benefits Fourteen percent of Coeur d'Alene's population receives SNAP or food stamp benefits. This ranks third among the benchmarks.

Housing Values With a housing value of $316,000, Coeur d'Alene is one of the most affordable communities among the benchmark cities; less than one-third of homeowners spend more than 30% of their income on housing.

Gross Rent Coeur d'Alene's monthly gross rent is $882 – 11% less than the U.S. average. Forty-four percent of the city's renters pay more than 30% of their monthly income on housing costs.

EDUCATIONAL ATTAINMENT

To compete in today's knowledge economy, talent matters. Educational metrics offer a look into capabilities of a community. A detailed analysis follows:

No High School Diploma Approximately 2,500 Coeur d'Alene residents (25 or older) do not have a high school diploma – nearly 8% of the workforce. This ranks fourth highest among the benchmark cities, on par with Spokane and Provo.

High School Diploma Twenty-five percent of Coeur d'Alene 's workforce only has a high school diploma, ranking second among the benchmark cities.

Associate's Degree Four in ten Coeur d'Alene residents (25 or older) has an associate's degree or some college; this ranks second among the benchmarks. The community has experienced a 17% increase in the level of this talent base.

Bachelor's Degree or Higher Nearly 8,700 Coeur d'Alene residents have a bachelor's degree or higher, 26.8% of the workforce and less than the U.S. average (30.9%). Since 2013, the number of residents with a BA or higher in Coeur d'Alene has increased 23%, ranking third among the community comparisons.

Figure 8: Bachelor's Degree or Higher (% of Residents), 2017

Boulder, CO — 73.8%
Bozeman, MT — 56.9%
Fort Collins, CO — 53.6%
Castle Rock, CO — 48.9%
Missoula, MT — 47.4%
Flagstaff, AZ — 45.1%
Bend, OR — 42.6%
Provo, UT — 42.5%
Boise City, ID — 40.9%
Logan, UT — 35.7%
Grand Junction, CO — 32.9%   U.S. Average: 30.9%
Spokane, WA — 29.5%
Coeur d'Alene, ID — 26.8%
Twin Falls, ID — 19.4%
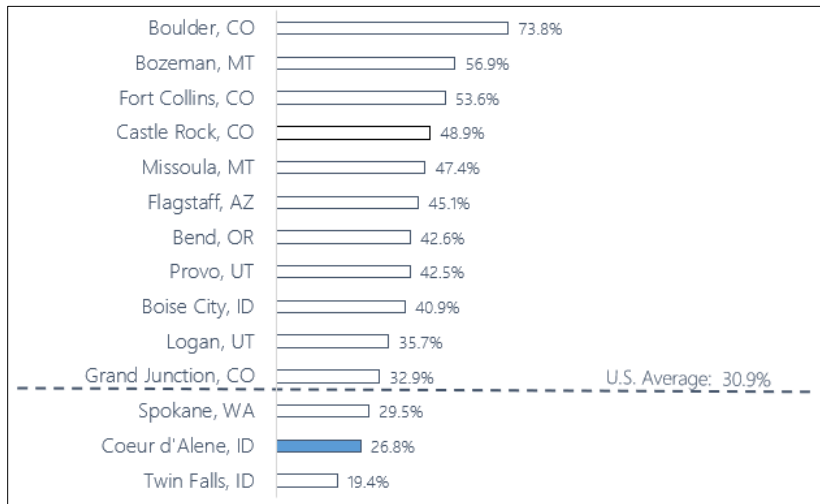
Source: U.S. Census American Community Survey 2017

COMMUTE PATTERNS

In 2017, Post Falls, Hayden, and Spokane were the primary work locations for Coeur d'Alene residents outside of the city itself. There were approximately 29,467 people employed in Coeur d'Alene, with 9,518 (32.3%) employees living in Coeur d'Alene and the remaining 19,949 (67.7%) commuting into Coeur d'Alene. For those traveling into Coeur d'Alene for employment, Post Falls, Hayden, and Rathdrum are the primary home locations.

Table 3 shows where Coeur d'Alene residents commute for their primary employment. Of the 11,062 (53.8%) Coeur d'Alene residents who commute to cities outside of Coeur d'Alene, 1,717 (8.3%) commute to Post Falls, 1,394 (6.8%) commute to Hayden, and 1,210 (5.9%) commute to Spokane.

Table 3: Work Locations of Coeur d'Alene Residents, 2017

Places	Count	Share
Coeur d'Alene	9,518	46.2%
Post Falls	1,717	8.3%
Hayden	1,394	6.8%
Spokane	1,210	5.9%
Spokane Valley	882	4.3%
Boise city	336	1.6%
Liberty Lake	309	1.5%
Rathdrum	239	1.2%
Dalton Gardens	217	1.1%
Moscow	206	1.0%
All Other Locations	4,552	22.1%

Source: US Census On the Map, 2017

Table 4 shows the commute distance for Coeur d'Alene residents. Most Coeur d'Alene residents (13,838 (67.2%)) commute less than 10 miles to their primary employment. The remaining residents travel 10 to 50 miles to work. About 2,246 (10.9%) travel more than 50 miles to their jobs each day. 8 in 10 Coeur d'Alene residents drive to work. Coeur d'Alene commute time is 17.9 minutes – 9 minutes shorter than the U.S. average.

Table 4: Distance from Home to Work - Coeur d'Alene Residents

Distance	Count	Share
Less than 10 mi	13,838	67.2%
10 to 24 mi	2,160	10.5%
25 to 50 mi	2,336	11.4%
Greater than 50 mi	2,246	10.9%
Total	20,580	100%

Source: US Census On the Map, 2017

INDUSTRY STRENGTH

Business markets and work-sheds do not adhere to geo-political boundaries. Therefore, Coeur d'Alene's economic strength is intertwined with the overall region and State of Idaho. As the city pursues economic development efforts and investments, it is important to align with ongoing federal, regional and state opportunities to maximize the return on efforts.

FEDERAL ALIGNMENT

The federal government recognizes the importance of regional collaboration to fostering economic development. It therefore has encouraged regions across the country to adopt an Economic Development District (EDD). EDDs are multi-jurisdictional entities, commonly composed of multiple counties and in certain cases even cross-state borders. They help lead the locally-based, regionally driven economic development planning process that leverages the involvement of the public, private and non-profit sectors to establish a strategic blueprint (i.e., an economic development roadmap) for regional collaboration.

Economic Development Districts (EDDs)
March 2019
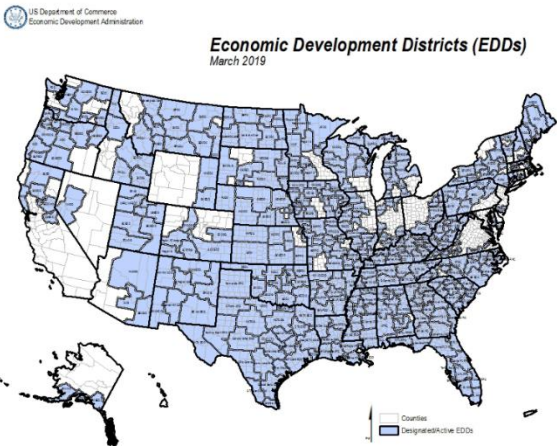
The strategic blueprint, known as a Comprehensive Economic Development Strategy (CEDS), is a strategy-driven plan for regional economic development. A CEDS is the result of a "regionally-owned" planning process designed to guide the economic prosperity and resiliency of an area or region. It provides a coordinating mechanism for individuals, organizations, local governments, and private industry to engage in a meaningful conversation and debate about the economic direction of their region.

Coeur d'Alene is part of the Panhandle Area Council EDD, which recently updated their CEDS in 2017. The benefit of a CEDS, beyond establishing a regional economic development direction, is that it facilitates a city's application for federal Economic Development Administration (EDA) grants, such as the Public Works grants of up to $3 million to fund public infrastructure or strategic projects to foster traded-sector industry[5] (not housing, tourism, or retail) growth. Therefore, if the city intends to utilize such resources, it is important to identify and focus on traded-sector businesses and continue to collaborate regionally.

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[5] Health care is traditionally defined as a local center industry as is typically serves the regional community and does not bring in new outside revenue and spur innovation and startups in the region like a traditional traded-sector industry. A presence of a strong higher-education presence providing research and development (R&D) tied to health care shifts the industry toward a traded-sector industry.

STATE AND REGIONAL OPPORTUNITIES

The State of Idaho has identified competitive clusters based on employer strength, workforce and industry assets such as land and infrastructure. In addition, the regional economic development organization, Coeur d'Alene Economic Development Corporation (CDA EDC), has identified specialized industry clusters for the region. Identifying alignment between the state, region and local industry strengths is important to maximize future marketing and talent development across all levels of government.

The US Cluster Mapping database provides over 50 million open data records on industry clusters and regional business environments in the U.S. to promote economic growth and national competitiveness. It is led by Harvard Business School's Institute for Strategy and Competitiveness in partnership with the U.S. Department of Commerce and U.S. Economic Development Administration. The tool defines the following industry strengths for the Coeur d'Alene region, which is comprised of Kootenai County. Understanding the regional strengths allows Coeur d'Alene to focus its efforts on industry clusters that are supported by are larger regional network of supply chains and skilled workforce that provide more resilience for the overall economy. Investing in strong regional clusters not only helps businesses that locate in Coeur d'Alene thrive but the overall region as well, thereby fostering a more resilient economy.

A location quotient (LQ) is a way of discovering the traded-sector industries or occupations that are truly unique and specialized in your regional economy (compared to the national average). LQ is calculated by comparing an industry's or an occupation's share of regional employment with its share of national employment. Any LQ over 1.0 is considered a strength. According to US Cluster Mapping, the CDA region has the following traded-sector industry strengths[6].

Table 5: Coeur d'Alene Region Industry Cluster Strength

Industry	Employment	Industry LQ	Establishments
Wood Products	680	6.21	24
Lighting	395	4.57	5
Upstream Metals	515	4.49	7
Downstream Metals	480	3.81	10
Hospitality	2,486	2.58	44
Information Technology	635	1.86	6
Marketing	460	1.14	35

Source: US Cluster Mapping, Information based on Kootenai County

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[6] Health care is traditionally defined as a local-sector industry as it typically serves the regional community and does not bring in new outside revenue or spur innovation and startups in the region like a traditional traded-sector industry.

CITY OF COEUR D'ALENE STRENGTHS

Considering Coeur d'Alene's existing employer strength, we recommend focusing on the following clusters that will leverage the regional and state efforts to bolster these industries. Firms and workers in these targeted industries can draw competitive advantage from their proximity to growing competitors, skilled workforce, specialized suppliers, and a shared base of research driven knowledge within each growing segment. A detailed description of each industry is further outlined below.

Figure 9: State, Regional and City Industry Cluster Focus

State of Idaho Key Industries	Panhandle Area Council CEDS	CDA EDC Target Industries	City Proposed Clusters
Advanced Manufacturing		High-Tech Manufacturing	**Advanced Manufacturing** (Aerospace and High-Tech)
Aerospace	Aerospace	Aerospace and Aviation	
	Wood Products		**Wood Products**
Technology & Innovation		Information Technology	**Information Technology**
Back Office/Shared Services		Financial and Service Center	**Professional Services**
	Health Care	Bioscience and Health Care	**Health Care**
Outdoor Recreation	Tourism		
		Distribution and Warehousing	
Food Production			
Energy	Mining		

Source: Bridge Economic Development

Advanced Manufacturing The state and region have identified the aerospace industry as an area of focus. For Coeur d'Alene this represents Tier 3-5 manufacturers that are making parts (such as bolts and machined parts.) that go into aerospace components (such as the seats, trays, luggage bins, etc.). The identified Metals and Lighting (Relay and Industrial Controls, Electrical Components) Manufacturing clusters represent some of these manufacturing suppliers. We recommend focusing more generally on Advanced Manufacturing to encompass all manufacturers in the region including high-tech companies. The State of Idaho anticipates the following job growth within the high-tech sector across the various regions.

Table 6: High Tech Job Growth by Region

Region	2016	2026	Growth	Growth Rate
Northern	3,647	4,601	954	26.2%
North Central	1,246	1,682	436	35.0%
Southwestern	24,821	28,134	3,313	13.3%
South Central	2,106	2,576	470	22.3%
Southeastern	3,160	4,113	953	30.2%
Eastern	2,813	3,038	225	8.0%

Source: Idaho Department of Labor, Idaho Knowledge Report

Wood Products Wood products is a legacy industry for the State of Idaho and Coeur d'Alene. It is appropriate then that this remains the region's strongest industry (excluding hospitality) in terms of LQ and employment. The industry is anchored by the Idaho Forest Group (IFG) which is headquartered in CDA, and has consolidated small operations into a cutting-edge, state-of-the-art company to become one of American's largest lumber producers.

Information Technology According to the Idaho Technology Council 2019 Idaho Knowledge Report (IKR), the CDA region's robust telecommunications network is based on fiber-optic backbone services from strong telecom providers - Intermax, Fatbeam and Frontier. Intermax just won a $11 million FCC initiative to extend fixed-wireless broadband service into rural parts of the region. This infrastructure is a critical element in fostering this industry and will help to attract remote workers that are drawn to mountain-and-lake country yet close to a major airport in Spokane with more affordable housing costs than Seattle or Silicon Valley.

Professional Services As the largest city in the northern Idaho panhandle region, with the presence of higher education institutes, CDA serves as a region hub for the greater area. Professional services will find the access to a large customer base, diverse industries and access to talent a compelling opportunity to stay and grow in the area. With the rise of remote work, CDA's quality of life and amenities-rich community may also be appealing to a knowledge workforce that is more flexible than ever before. As identified in Table 5, the region has a competitive advantage in marketing, which could be advantageously coupled with the information technology industry for a focus opportunity in digital marketing.

Health Care As a regional hub, this cluster is a growing, local cluster (not a traded-sector) for CDA; however, there are long-term growth possibilities for research with the two medical schools in

Spokane and Kootenai Health's partnership with the universities for internships and residencies. The short-term economic development opportunity regarding health care pertains to workforce development concentration to skill the existing residents to go into health care, which has strong livable wages, averaging $89,660 for Healthcare Practitioners and $33,060 for Healthcare Support[7].

Industries Not Recommended

As the city allocates staff and monetary resources toward economic development it is helpful to recognize that there are industries that can be fostered by the market and do not warrant additional city resources. We identified the following industries as appropriate for development by the market and other important stakeholders.

- Distribution: Distribution is growing within the region because of the population and labor growth in the Pacific NW, as well as the SW Canadian provinces. It is, however, not yet showing-up in US Cluster Mapping data. Development of these facilities may be pursued by the market, but they are not an industry cluster that requires dedicated staff to foster skills training development or talent attraction. Therefore, it is not included as a focus industry cluster.

- Hospitality/Tourism: While hospitality does bring new outside revenue into the region (thereby making a traded-sector cluster as identified by US Cluster Mapping), it does not encourage innovation or provide livable wages with career ladder opportunities. It is also not a highly resilient industry as evidenced by the recent global impacts of Covid-19. So, although the Tourism Industry is an important cluster in the region, we recommend that the city look to organizations whose historical focus is to promote tourism and recreation (i.e., CVB, the Chambers, the Hospitality Industry; Idaho Tourism, etc.) to continue to promote this industry.

OCCUPATIONS AND SKILLS

As outlined earlier in the analysis, access to a talented workforce is the first priority for businesses. The desired workforce must have knowledge-based skills to perform in the increasingly complex economy. The following information outlines local strengths and opportunities for growth. A look at the occupational clusters provides an overview of the orientation of the broad skills of a community, while the skills analysis offers us an insight into the specific skills and talents that are driving CDA's economy.

CITY OCCUPATION SECTORS

There are 3 broad set of skills that drive today's economy: knowledge, service, and working sector. As indicated below, Coeur d'Alene has a predominance of service sector jobs tied to retail and accommodations. This means that if the Coeur d'Alene economy is going to diversify, focused attention on attracting new residents or training existing ones in the knowledge and working, blue-

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[7] https://www.bls.gov/oes/current/oes_17660.htm#31-0000

collar, sectors will be very important as a strategy focus. Knowledge and working sector jobs also offer higher-paying employment opportunities for local residents.

Service Sector Five in ten Coeur d'Alene workers (47.9%) have skills associated with the service sector – a share that ranks second among the benchmark cities and above the U.S. average (41.5%). Coeur d'Alene's service sector has increased 6% since 2013, two times the national average. Service sector occupations include: healthcare support; protective services; food preparation; personal care; sales; and office and administrative support

Figure 10: Coeur d'Alene Service Sector, 2017

Flagstaff, AZ	48.6%
Coeur d'Alene, ID	47.9%
Spokane, WA	45.6%
Twin Falls, ID	45.3%
Provo, UT	44.4%
Missoula, MT	44.0%
Grand Junction, CO	43.8%
Logan, UT	42.4%
Bend, OR	42.2%
Boise City, ID	41.5% U.S. Average: 41.5%
Fort Collins, CO	41.0%
Bozeman, MT	40.5%
Castle Rock, CO	39.4%
Boulder, CO	35.9%
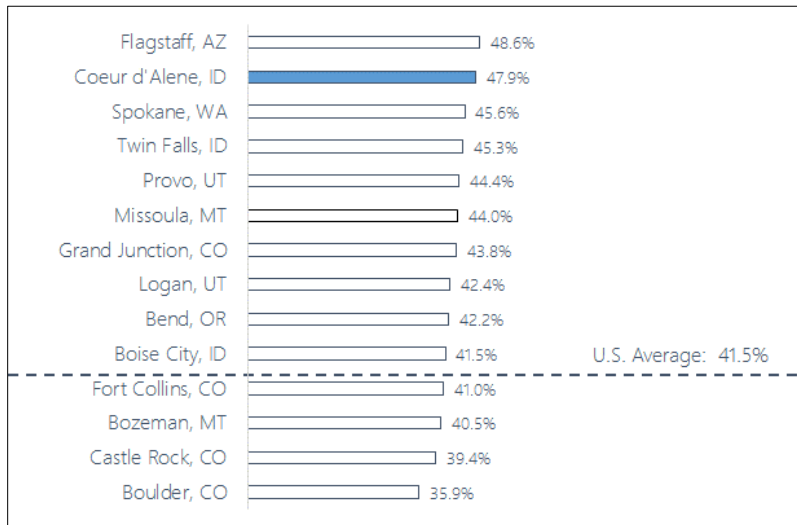
Source: U.S. Census American Community Survey 2017

Working Sector Approximately 4,500 Coeur d'Alene residents make up the city's working sector (20%) – skills associated production/ manufacturing, transportation, and maintenance. This is the fourth highest share among the benchmark cities. There's be a 1% decrease in the working sector since 2013.

Figure 11: Coeur d'Alene Working Sector, 2017

Twin Falls, ID	27.4%
Logan, UT	22.9% U.S. Average: 21.5%
Grand Junction, CO	20.0%
Coeur d'Alene, ID	19.9%
Spokane, WA	19.2%
Bozeman, MT	17.4%
Bend, OR	14.8%
Missoula, MT	14.6%
Boise City, ID	14.5%
Provo, UT	13.8%
Fort Collins, CO	13.3%
Flagstaff, AZ	13.2%
Castle Rock, CO	12.3%
Boulder, CO	7.2%
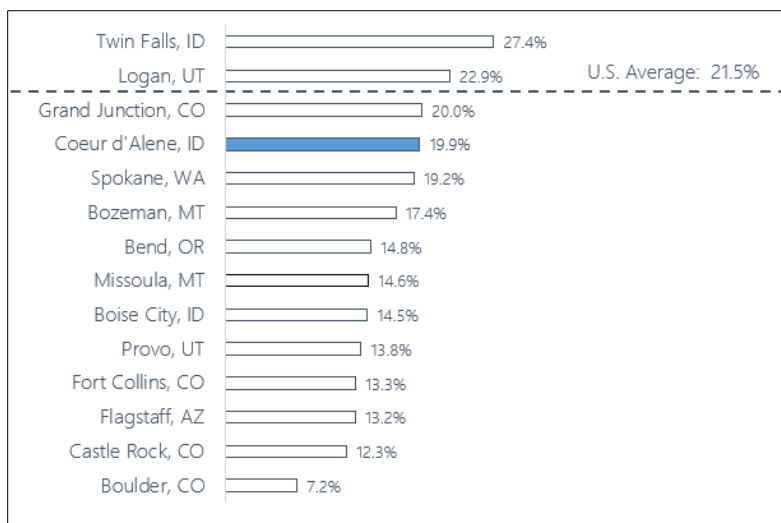
Source: U.S. Census American Community Survey 2017

Knowledge Sector Coeur d'Alene's knowledge class (32.3%) – workers with skills in technology, arts/culture, professional services, and education – ranks second to last among the benchmark cities and is well below the U.S. average (37.4%). That said Coeur d'Alene's knowledge class has grown more than 20% since 2013, ranking fourth and on par with similar growth rates of Bend, Castle Rock, and Bozeman.

Figure 12. Coeur d'Alene Knowledge Sector, 2017
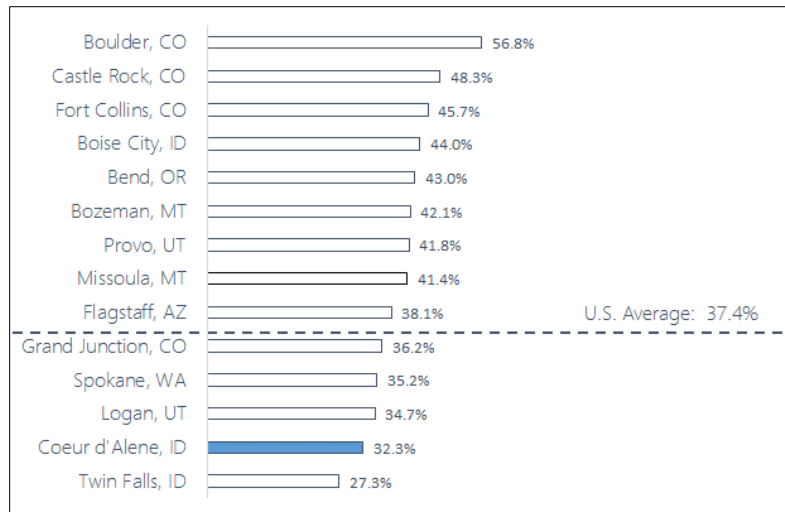
Source: U.S. Census American Community Survey 2017

CITY SKILLS

As noted above, a skill analysis allows us to determine if Coeur d'Alene has the appropriate talent base to support the recommended traded and local clusters in the strategy. Generally, Coeur d'Alene skill specializations (as defined by the location quotients) are as follows:

- Construction (1.48)
- Healthcare Support Services (1.27)
- Food Preparation (1.22)
- Sales (1.12)
- Office and Administration (1.12)
- Health Practitioners (1.09)
- Building and Grounds Keeping (1.04)

Given the recommended target sectors and demands of the CDA economy, the following skills clusters are important to the community's future growth:

Production: Representing nearly 6% of CDA's employment, there are more than 3,900 workers with production skills. There are also an additional 3,000 workers with skills related to transportation and 2,700 with those tied to installation and repair. Each of these sectors are will be important talent pools for CDA's growing advanced manufacturing and wood products sectors.

Construction: Coeur d'Alene's workforce with construction skills has increased (31%) the most of all occupational sectors from 2014 to 2019. This sector also represents the greatest skill specialization for the region — 48% larger than the U.S. average (for a community its size). This skill set will be important as the community continues to build, develop and address its housing supply.

Computer/ IT and Tech Skills: Approximately 1,000 workers in Coeur d'Alene have technology skills; while the share of these workers is less than the U.S. average, this skill cluster has expanded by 21% from 2014 to 2019 and is projected to grow an additional 12% by 2024. On average, CDA technology workers earn $61,200 annually.

Management and Business and Financial Operations: More than 6,500 workers in Coeur d'Alene have management and business and financial operation skills; this represents 9% of the workers in CDA. These skill clusters have experienced growth over 20% from 2014 to 2019, and will grow between 8 and 11% percent by 2024.

Healthcare Skills: With more than 4,300 workers, the region boasts a specialization for healthcare practitioners that is 9% greater than the U.S. average. Likewise, the Coeur d'Alene's healthcare support cluster is 27% larger than the U.S. average, employing 2,450 workers. Both skill clusters also represent two fast-growing sectors for the region.

Science Expertise: Coeur d'Alene's science occupational cluster is the most specialized creative/ knowledge sector for the community — 19% more concentrated than the U.S. average – and the second fastest growing sector. However, it employs less than 1,000 workers. This sector offers an opportunity to support a growing local healthcare sector as it transitions into an export industry for the community.

BUILDING AND RETAINING TALENT

As discussed above, the number one priority for businesses is the ability to retain and attract talent. As talent can go anywhere, it desires a "place" that consists of amenities (restaurants, entertainment, and retail) and access to outdoors in addition to a job. Coeur d'Alene is fortunate to have a strong foundation for both of these elements to make an exceptional place that can set it apart from other communities across the country also working hard to retain and attract talent. Additionally, because of its size, Coeur d'Alene offers the opportunity for aspiring talent – especially millennial talent – the opportunity to connect with local business community and City leadership to have an impact. Enhancing these elements of place – both physical and community - in conjunction with growing a diverse job base, is an important area of focus for the City.

In addition to promoting quality of place as talent attraction, Coeur d'Alene must also examine the training and on-ramp opportunities that it presents to prospective talent. A diverse, highly-skilled workforce is an important asset for any community. In order to weather the inevitable booms and busts of the economy, as well as cycles in the tourism sector, Coeur d'Alene must provide skills training and pathways to job opportunities that offer residents (and prospective residents) to tap into the community's industry opportunities. While this will not eliminate income stratification or workforce

skills gaps, it will allow individual residents to achieve their full economic potential, thereby improving Coeur d'Alene's fiscal growth and sustainability for the future.

The City of Coeur d'Alene is fortunate to have two higher-education assets that include North Idaho College (NIC) and the University of Idaho. Leaders from these institutions are already working with industry clusters and should continue that relationship. It also is important to align the K-12 system with industry to foster an opportunity to build a local talent pipeline with Coeur d'Alene students that do not want to go to college and would like stay in the community. These students must see that there is an obvious path from developing educational and skills development to job placement in order to retain them.

EDUCATION ALIGNMENT

The following matrix of education assets tied to specific industry clusters serves as a guide for future actions outlined under the Goals and Objectives section. Focused discussions with education stakeholders are important to understand and promote programs that support the CDA economy and opportunity for youth to grow a career in their hometown. At the same time, stakeholders should work with industry leaders to determine what skills are needed and if certain programs could be developed.

Figure 13: Industry Cluster and Education Program Alignment Matrix

Industry	CDA School District 217		NIC		U of I CDA	
Cluster	*Existing Program*	*Potential Program*	*Existing Program*	*Potential Program*	*Existing Program*	*Potential Program*
Advanced Manufacturing		CTE - wood/tech shop	Aerospace Technology Advanced Manufacturing: • Aviation Maintenance Technology • Computer Numerical Control (CNC) Mill Operation • Composite Fabrication • Composite Technician • Repair and Quality Assurance • Technology Core			
Wood Products		CTE - wood/tech shop				Renewable Materials, BS (Moscow Campus)
Information Technology		Coding Courses	• Computer Information Technology, Associate • Computer Science, Associate		Computer Science, BS	
Professional Services			• Business Management • Web design			
Health Care		Nursing Pathway Program	• Medical Assistants • Nursing • Pre-Med			

Source: Bridge Economic Development

STARTUP ECOSYSTEM

Small businesses are critical to Coeur d'Alene's community. Not only do they provide employment for residents, but they help to create an authentic destination experience for Coeur d'Alene's visitors. Fostering an environment that encourages and celebrates small business growth is an important aspect to a resilient and diverse economy.

BUSINESS ESTABLISHMENTS

From 2012 to 2016, Coeur d'Alene experienced a 7.5% increase in the number of business establishments, while the U.S. average was a 4.4% increase. Figure 15 defines the amount of industry sectors making all of the businesses (traded and local) making up Coeur d'Alene's business establishments.

Figure 14. Total Business Establishments, 5-Year Growth, 2012-2016
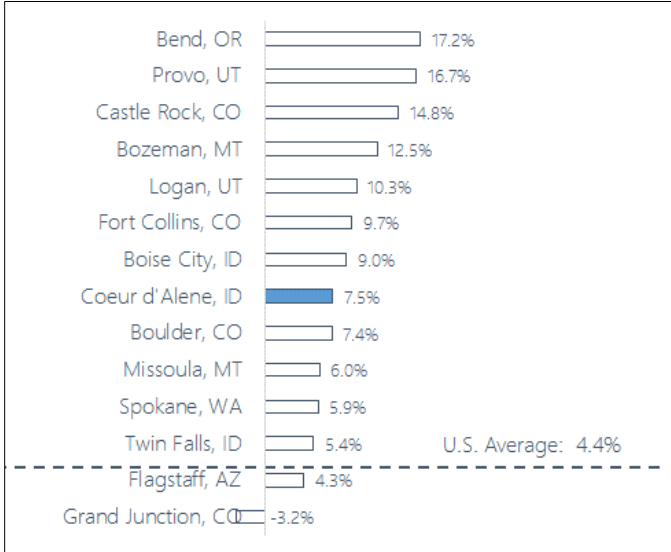
Source: U.S. County Business Patterns 2016

Figure 15. Coeur d'Alene Business Establishments, 2016

Figure 15. Coeur d'Alene Business Establishments, 2016

Industry	Percent
Construction	15.5%
Retail Trade	12.5%
Health Care and Social Assistance	10.8%
Professional Services	10.6%
Accommodation and Food Services	8.4%
Other Services	7.3%
Finance and Insurance	5.9%
Real Estate and Rental and Leasing	5.7%
Manufacturiing	5.2%
Administrative and Support	5.2%
Wholesale Trade	3.5%
Transportation and Warehousing	2.3%
Arts, Entertainment and Recreation	2.0%
Information	1.5%
Educational Services	1.3%
Agriculture	1.0%
Management of Companies and…	0.5%
Utilities	0.3%

Source: U.S. County Business Patterns 2016

BUSINESS INVESTMENT

In 2018 Kootenai County had 30 total deals, which is comprised of private investment firms financing a company, valued at $249 million. This makes it the second highest amount of deal flow after Ada County, which had 81 deals valued at $1,356 million, in the State of Idaho[8].

As identified above, Coeur d'Alene has competitive industrial advantages within information technology and other high-tech industries. In order to encourage new startups in these sectors, it will be important to foster an environment that has access to venture capital. Venture capital (VC) firms are focused on traded-sector industries that have an opportunity to scale into national and global firms that can be sold or "go public" through an Initial Public Offerings (IPO). Therefore, VC firms rarely invest local-sector firms. Additionally, different VC firms specialize in different types of companies, so it is important to understand which firms are already working with startups in the identified CDA clusters. The economic stakeholders should foster strong relations with the VC firms to encourage additional investment in emerging businesses within the same clusters.

KEY THEMES

In preparing the strategy, the City hosted local stakeholders for two days of stakeholder interviews. Attachment D provides a summary of the feedback. These meetings were supplemented by the distribution of a digital survey, which received over 300 responses. The following key themes emerged as important topics amongst stakeholders or were identified through research as unique assets to the City that should be considered.

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[8] Idaho Knowledge Report, Idaho Technology Council, 2019

- Provide more emphasis on year-round economy

- We need more than just living-wage jobs

- Don't focus too much on business

- Attract and develop industries, not resort centered

- More educational partnerships

Outdoors and Environment This is overwhelmingly the most defining and cherished asset of Coeur d'Alene. It is why people vacation here and choose to stay. Further embracing the outdoor beauty, clean air and climate, and experiential recreation is a significant advantage that should be leveraged to diversify the economic base.

"Homecomer" Population A homecomer is defined by Wendell Berry, the Kentucky writer and farmer, as someone who spent some time away, usually to pursue better opportunities in cities, and then choose to return to their rural roots. This is an emerging theme across rural and micropolitan communities across the country and should be embraced.

Downtown Core The downtown area is a charming element of the community that provides desired amenities such as restaurants and retail. Focused attention on supporting the existing businesses and catering to the local community is important.

GOALS AND OBJECTIVES

In order to prepare a community to proactively engage with rapidly changing trends, it must have a strategy in place. Without a strategy, efforts are often reactive, non-collaborative, and not connected for meaningful impact. For an economic development plan to succeed, numerous partners and organizations must be engaged and collaborate toward common goals. At the same time, it is essential for public and private entities to recognize that they are partners in economic development efforts, as one cannot be sustained without the other. To efficiently and effectively align goals, a community must understand, document, and achieve consensus on its vision, values, opportunities, and objectives, which is being done within the overall comprehensive plan.

The world's economy is changing rapidly. An established "playbook" provides enough broad goals to recognize opportunities when they arise. Clear direction regarding Coeur d'Alene's roles will help determine projects that should be pursued and those that should be set aside. To effectively implement a strategy, it is as important to say "no" to certain opportunities as it is to say "yes" to others.

In addition, it is important to annually revisit the document to determine where progress is being made and where other areas are deficient. It will be necessary to update the document every three to five years in keeping with the rapid pace of change in the economy.

The following goals, objectives and actions were developed in collaboration with the Coeur d'Alene community, project staff, and expertise of the consulting team. Specific actions that are highlighted in

blue are from the Panhandle CEDS document, which indicates opportunities for local and regional collaboration and potential EDA grant funding.

GOAL 1: RETAIN, EXPAND, AND ATTRACT BUSINESSES

Why this Goal?

Diversifying the economic base beyond the retail and tourism industry is critical to sustain the health of Coeur d'Alene. Diversification will provide alternative job opportunities with middle-income wages. Furthermore, companies within manufacturing or professional services have the opportunity to scale up and often encourage new companies to spin-off. Attracting new businesses is challenging and even more so in smaller communities. Therefore, the most efficient way to grow the economic base is to support existing companies by understanding their barriers to growth and talent needs. Additionally, companies that start in a community are more likely to stay and grow there.

Objective 1.1: Convene industry cluster working group comprised of business leaders, workforce providers and economic development professionals to define needs

Businesses tied to similar industries should be convened to discuss what they need to grow. Focused meetings such as these build collaboration and foster cross-pollination of opportunities and ideas. In addition, the meetings result in specific action items necessary to address business growth needs. Community partners can then effectively work to remove barriers and provide meaningful support to businesses. The businesses will also inform what type of sites/buildings and infrastructure is needed to foster growth. As indicated in comments from business leaders (Attachment D), gathering business leaders to promote industry is desired.

Actions:

- Identify a key city staff person that will monitor and implement identified actions in this analysis. Implementation should be done collaboration with other city staff in public works, planning, city manager's office, etc.
- Convene industry cluster working groups comprising business leaders, workforce providers and economic development professionals and to define needs.
- List all businesses within each cluster and supporting regional assets to identify cluster strengths and supply chain needs
- Convene a meeting at least once a year with businesses within each different cluster. Include industry associations, universities, colleges, and K-12 institutions at the meetings.
- Listen to businesses and document consistent needs to inform unique strategies for each cluster.
- Identify competing local communities with each different cluster and what they do well. Visit the communities to assess best practices.
- Promote local businesses products and services with a "Know your Local' campaign.
- Connect industry supply chains by identifying local sub-suppliers that can provide parts/materials/services to local end-product manufacturers.

Objective 1.2: Provide adequate sites and infrastructure for business expansion based on needs

The City has a unique role in economic development pertaining to site and infrastructure development. In understanding what businesses need, time and resources can effectively go toward addressing the needs and growing the economic base. If business operations involve complex manufacturing processes, it is helpful to engage fire and building officials to proactively problem solve potential regulation hurdles.

Actions:

- Identify 10 traded-sector companies to visit annually (generally 1 per month) and understand physical barriers and opportunities for growth.
- Develop a systematic business visitation program and report out key findings to area economic development stakeholders.
- Share with them new workforce programs or internship needs to enhance collaboration.
- Continue to invest in Health Corridor urban renewal district to support the medical industry poised for growth of living-wage jobs.
- Develop economic incentives to attract new businesses or encourage business startup and development activities that respond to feedback from businesses.
- If traded-sector companies contemplate locating in the Atlas Mill, coordinate with EDA to determine if a public works grant for infrastructure construction is an opportunity that can be pursued.

Objective 1.3: Support local businesses by providing technical education, permit assistance, and expand opportunities for affordable entry into the market

Local businesses provide the important amenities that make a community distinct and help to attract and retain talent. They also serve as an onramp for minority and women entrepreneurs, especially through food and personal service businesses. Removing the barriers to entry is critical for improving equity and access to wealth for all Coeur d'Alene residents.

Actions:

- Continue to allow for and encourage food carts in distinct locations. This is a low-risk and low-cost way for startups to enter the market and test new products. It also introduces diversity and vibrancy for customers. Work with existing food cart operators to determine what they need to expand operations such as a commercial kitchen.
- Provide a System Development Charge (SDC) Assistance Program that lets tenants lease sewer capacity on a monthly basis rather than purchase it up front. Lease payments are attached to a monthly utility bill and are calculated as a percentage of the total SDC assessment.
- Host a Small Business Month with targeted meetings. Include a focus for training/education on relevant topics determined by the attendees through polling. (Examples include storefront merchandising, identifying grant/loan opportunities, tax help, etc.)

GOAL 2: GROW AND ATTRACT TALENT

Why this Goal?

Talent is the number one asset and driver for business in deciding where to expand and grow. A community that easily attracts talent has a significant competitive advantage for business. Intentional efforts to attract and grow your own talent is vital. Without a skilled workforce, local businesses cannot grow and thrive.

Objective 2.1 Prepare Youth for Economic Opportunity through coordinated STEM and CTE programs and internship/ apprenticeship opportunities

Educational attainment is one of the significant factors in determining income growth and access to career pathways. Engaging youth early regarding career opportunities is a critical component in high school graduation success rates and preparation for higher education. Research has demonstrated that access to quality Career Connected Learning (CCL) or access to apprenticeship programs increases graduation rates and enrollment in postsecondary certification, credential, and degree programs. For this objective to succeed, both business and education leaders must be committed to its success.

Actions:

- Support STEM (science, technology, engineering, math) education in elementary, middle, high school and college programs. Make regional businesses aware of programs to provide internships or tours.
- Work with K-12 and hospital to establish a career pathway program into health care. Include Coeur d'Alene Tribe in these meetings to foster opportunities for diverse population.
- Consider hosting a STEM fair focused on showcasing CTE machining and construction projects or robotics competition
- Publicize the availability of vocational/non-credit courses that are designed to respond to business needs.
- Engage retirees in mentorship programs at the high school and college levels to take advantage of learned experience.

Objective 2.2 Invest in higher education skill and degree programs that align with the city's export sectors and workforce needs

Complex issues driving income stratification and workforce skills gaps are making it more difficult for all residents to realize positive personal economic growth in keeping with business growth. To plan for this modern economy, communities must consciously foster a resilient economy that is derived from a diverse industry base and skilled workforce to weather inevitable negative portions of economic cycles. This is a long-term goal that requires significant collaboration and investment between education, government and businesses.

Actions:

- Provide support to STEAM[9]-related and other IT programs in our schools for regional gaps in program delivery.
- Identify the gaps in program delivery and prioritize UI Extension, NIC, Workforce Training Center.
- Meet regularly with industry clusters to determine necessary skills training and include higher education providers to develop curriculum as necessary.
- Encourage business owners to help craft and instruct skills programs.
- Support initiatives for entry level workers to maintain their employment status through good workforce behavior and interpersonal skill training. Provide complementary program components for participating employers with tools to reduce turnover costs for their entry level workforce.
- Develop plans and seek funding to address workforce issues when living wage skill gaps in targeted industry sectors are identified.

Objective 2.3 Launch an initiative focusing on attracting talent back to the community

Talent is the number one asset and driver for business in deciding where to expand and grow. A community that easily attracts talent has a significant competitive advantage for business. There is already an emerging trend of returning "homecomers" intent on contributing to the community. Intentional efforts to build of this trend through networks to lower barriers to entry into community, business, and social networks is important.

In recruiting new talent, employers often struggle to secure management positions that are typically filled by people that are 35 – 45 years old due to work experience. Often these people are just starting out or have established a family and therefore are focused on living in a community with family-oriented amenities. Public investment and retail amenities that serve this group is important to retain experienced talent.

Actions:

- Create a Task Force (including North Idaho Higher Education collaborative) of diverse local residents that are the demographic make-up of the target audience.
- Attract and retain educated and trained youth. Create a market for youth to want to be here by identifying job opportunities through high school counselors.
- Educate school administration and teachers about the career pathways available in CDA, including advanced manufacturing, IT, and healthcare.
- Develop specific recruitment strategies for targeted industries and employers that provide benefited living wage jobs.
- Build different types of housing to provide diverse and affordable options for young talent.

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[9] STEAM is a term coined by Massachusetts Institute of Technology (MIT) and Rhode Island School Design (RISD) that emphasizes the need to integrate design and art with technology. It stands for Science, Technology, Engineering, Arts and Math.

GOAL 3: ENHANCE THE STARTUP ECOSYSTEM

Why this Goal?

New businesses account for nearly all net new job creation and almost 20 percent of gross job creation. Furthermore, companies less than one-year-old have created an average of 1.5 million jobs per year over the past three decades[10]. People generally start businesses in the places they are already located, and many of the resources they access are at the local or regional level. These businesses need exposure to capital and industry networks for collaboration and support. It is important to support an ecosystem where startups are supported and celebrated to create new jobs.

Objective 3.1 Convene startup working group comprised of business leaders, workforce providers and economic development professionals and to define needs.

Business has different needs depending on its size and age. Startups often have very different needs so hearing from them directly is important. For example, as identified in the stakeholder feedback, one business highlights the important of marketing and promotion. This is a low-cost and straightforward action that can be provided and address distinct needs. Listening and responding to startups is an important way to foster the startup ecosystem.

Actions:

- Sponsor and support quarterly meet-ups of remote workers/professional startups. This encourages peer to peer networking and addressing problems within the industry. (Keep it exclusive to the professional industry. This is not intended for service providers to network/solicit business).
- Map the CDA startup ecosystem, identifying relationship and connections between educators, investors, founders, talent and "anchor" organizations[11]. Ex: Endeavor's NYC Tech Map
- Engage with Coeur d'Alene Tribe to bring diverse ideas and opportunities into the startup ecosystem.
- Activate hidden CDA investors (those who led successful careers and have retired in the community) to provide expertise and potential capital to local startup enterprises.
- Encourage the creation local capital funds through "angel investors", crowd funding strategies, and other mechanisms to support business startup, growth and retention.

Objective 3.2 Develop public-private partnerships to develop the types of office space and amenities desired by startups.

Businesses are not real estate developers. They need others to build desired space for them. The city can play an important role in fostering the development of needed space through different

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[10] The Importance of Young Firms for Economic Growth, Kaufman Foundation, September 13, 2015

[11] Anchor institutions are nonprofit institutions that once established tend not to move location. They are often referred to as "eds and meds" or higher education and medical institutions.

regulations as well as fostering public-private relationships. At the same time startups need affordable space, which can be typically found in remodeled existing buildings.

Actions:

- If the industry deems it necessary, work with private developers to expand office co-working space.
- Verify if industry leaders would like more creative office space. Target investments in East Sherman Avenue, Downtown and locations that have existing buildings that can be renovated more cost-effectively than building new structures.
- Develop an Adaptive Reuse Program to incentivize redevelopment of long-vacant structures, including historic buildings, and buildings located on brownfield sites that are out of compliance with existing code.
- Consider applying for an Environmental Protection Agency (EPA) brownfield grant to assist with evaluation of potential brownfield sites to remove uncertainty and incentivize redevelopment.
- Develop an Adaptive Reuse Program to incentivize redevelopment of long-vacant structures, including historic buildings, and buildings located on brownfield sites that are out of compliance with existing code.
- Support and encourage private development of incubators, "makerspaces" and similar activities to encourage entrepreneurialism, innovation, and business startups as part of larger industry sector/cluster strategies.

Objective 3.3 Promote Access to Outdoors for Remote Workers

Coeur d'Alene is fortunate to be in the middle of gorgeous mountain-and-lake country with clean air, abundant water, and a four-season climate. At the same time, it is very well connected with quick access to a major airport in Spokane and a strong broadband network. Therefore, it is well positioned to host remote workers seeking an exceptional quality of life while retaining easy access to career and business networks. Other cities such as Tulsa, Oklahoma are attempting to attract this desired set of workers through the Tulsa Remote program. CDA has a far more distinct community and opportunity and could easily do the same.

Actions:

- Market Coeur d'Alene as a unique outdoor environment to work remotely.
- Include the Coeur d'Alene tribe in this messaging to integrate importance of environmental stewardship to maintain natural resources such as the lake.
- Develop a competitive identify for Coeur d'Alene that resonates with prospective talent centered on the community's outdoor ethos and quality of place
- Encourage businesses to support K-12 sporting clubs (e.g. hiking, biking, skiing) to build connection between outdoor recreation and career opportunities to retain future employees.

Objective 3.4 Expand partnerships with North Idaho College, such as opportunities to use the community maker space and rapid prototyping (Gizmo) facilities.

Innovation is a critical component in fostering a resilient economy. The strength of the regional startup ecosystem depends on the ability to produce new ideas and companies. Investment in testing and lab space to off-set significant costs for startups is a significant asset that makes Coeur d'Alene distinct. Further investment and promotion in these assets are important.

Actions:

- Create workspace, pathways and connections for innovators, entrepreneurs and thought leaders to bring ideas to fruition and new products to market.
- Continue the momentum (Innovation Den, eHub, Gizmo, Fab Lab, Business Center, Inland Northwest Food Network)

ATTACHMENT A: Peer City Benchmarking

COEUR D'ALENE COMPETITIVE BENCHMARKING

SEPTEMBER/ OCTOBER 2019

BENCHMARKS

BENCHMARKS

- Bend, OR
- Boise City, ID
- Boulder, CO
- Bozeman, MT
- Castle Rock, CO
- Flagstaff, AZ
- Fort Collins, CO
- Grand Junction, CO
- Logan, UT
- Missoula, MT
- Provo, UT
- Spokane, WA
- Twin Falls, ID

DEMOGRAPHICS

TAKEAWAYS

- **Population Growth Two Times the National Average.**
  Nearly 49,000 residents call Coeur d'Alene, home, a 7.9% increase since 2013 – a gain of 3,600 residents.

- **Millennial Population.**
  Millennials make up 24% of the city's population – ranking 10th among the benchmark communities. The city's Millennial population has increased 5.8%, slightly faster than the U.S. average but much slower than peer benchmarks such as Bend, Castle Rock, Boulder, and Bozeman.

- **Older Median Age.**
  Coeur d'Alene's median age is 36.4, ranking it as the second oldest city among the benchmarks.

- **Hispanic Residents.**
  Approximately 2,600 Coeur d'Alene residents are Hispanic (5.3% of the population) – ranking third from the bottom of the benchmark cities. Since 2013, Coeur d'Alene's Hispanic population has increased just 3%, compared to 11% for the U.S. average.

- **Foreign-Born Residents.**
  Just 2.3% of Coeur d'Alene residents are foreign-born, ranking last among the benchmark cities.

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DEMOGRAPHICS

Population, 2017

City	Population
Boise City, ID	220,859
Spokane, WA	212,982
Fort Collins, CO	159,150
Provo, UT	116,199
Boulder, CO	106,271
Bend, OR	87,167
Missoula, MT	70,847
Flagstaff, AZ	69,903
Grand Junction,…	60,882
Castle Rock, CO	57,274
Logan, UT	49,957
Coeur d'Alene, ID	48,618
Twin Falls, ID	47,340
Bozeman, MT	43,132
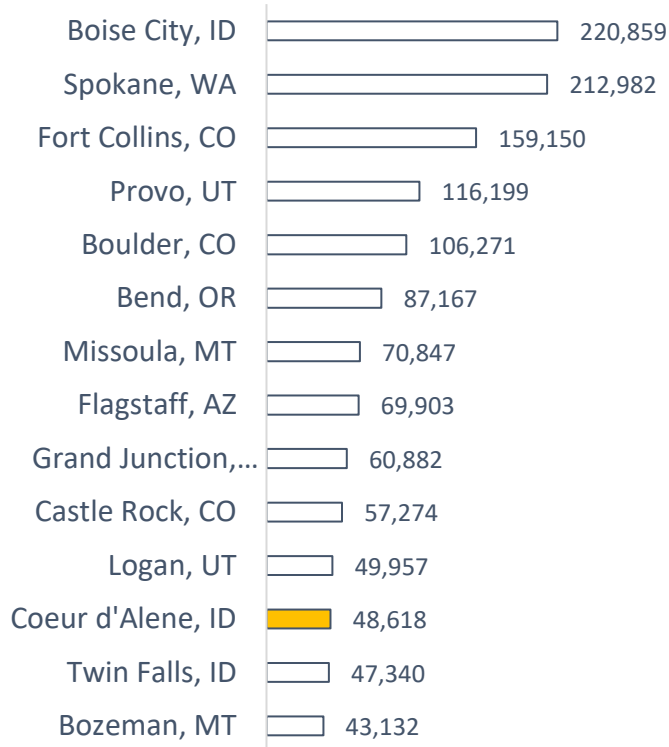
Source: U.S. Census American Community Survey 2017

Population 5-Year Growth, 2013-2017

City	Growth
Castle Rock, CO	14.6%
Bozeman, MT	12.9%
Bend, OR	11.6%
Fort Collins, CO	8.4%
Coeur d'Alene, ID	7.9%
Boulder, CO	5.9%
Twin Falls, ID	5.8%
Boise City, ID	5.3%
Flagstaff, AZ	5.0%
Missoula, MT	4.6%
Logan, UT	2.9%
Grand Junction,…	2.4%
Provo, UT	1.8%
Spokane, WA	1.7%

U.S. Average: 3.0%

Source: U.S. Census American Community Survey 2017-2013

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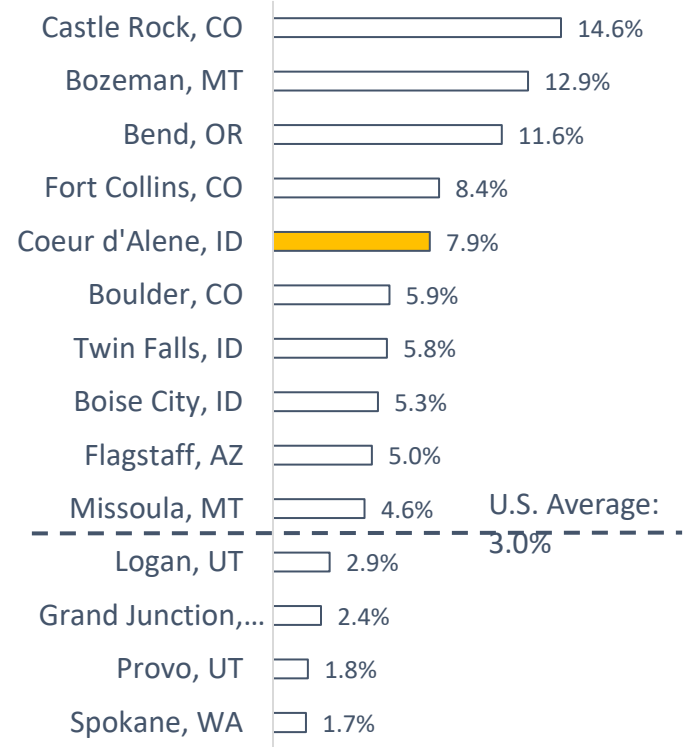
DEMOGRAPHICS

Millennial (20-34) Population (Share of Residents), 2017

City	Share
Provo, UT	46.2%
Logan, UT	42.7%
Bozeman, MT	39.3%
Boulder, CO	36.9%
Flagstaff, AZ	34.4%
Fort Collins, CO	33.7%
Missoula, MT	31.2%
Spokane, WA	24.2%
Grand Junction,…	23.7%
Coeur d'Alene, ID	23.6%
Boise City, ID	23.4%
Twin Falls, ID	22.9%
Bend, OR	20.7%
Castle Rock, CO	17.6%

U.S. Average: 20.7%
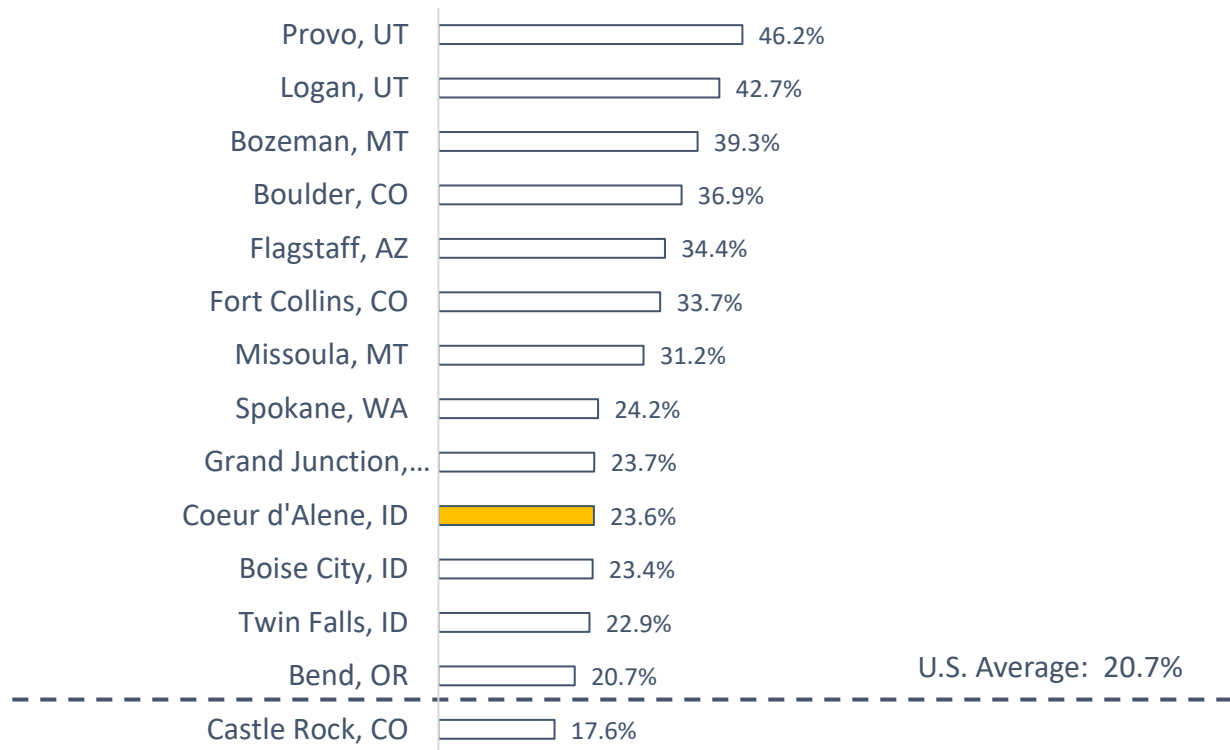
Source: U.S. Census American Community Survey 2017

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DEMOGRAPHICS

Median Age, 2017

City	Median Age
Bend, OR	38.2
Coeur d'Alene, ID	36.4
Boise City, ID	36
Grand Junction, CO	35.9
Spokane, WA	35.8
Castle Rock, CO	34.8
Twin Falls, ID	32.7
Missoula, MT	32.7
Fort Collins, CO	29.2
Boulder, CO	28.6
Bozeman, MT	28
Flagstaff, AZ	25.1
Logan, UT	23.9
Provo, UT	23.7

U.S. Average: 37.8
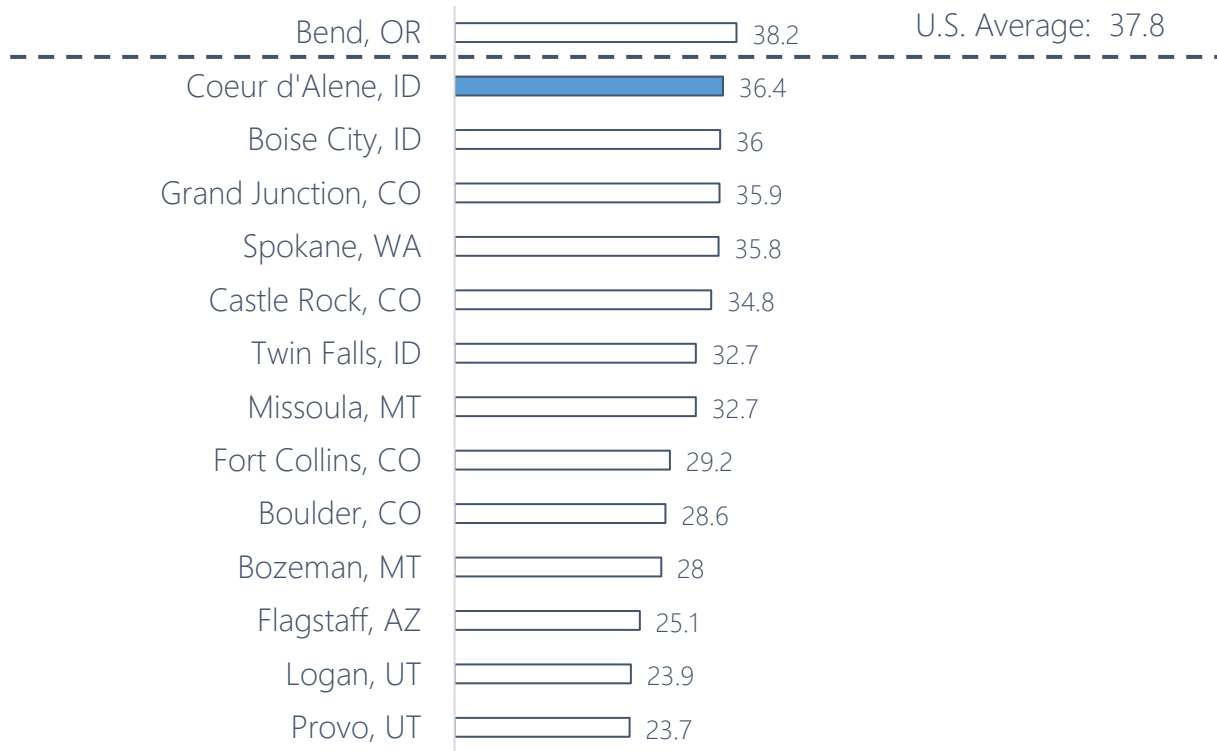
Source: U.S. Census American Community Survey 2017

DEMOGRAPHICS

Share of Residents That Moved 1-Year Ago from a Different County, State or Country, 2017

City	Percentage
Provo, UT	12.4%
Boulder, CO	11.0%
Bozeman, MT	9.2%
Flagstaff, AZ	8.9%
Fort Collins, CO	7.0%
Logan, UT	6.8%
Bend, OR	5.7%
Castle Rock, CO	5.5%
Missoula, MT	5.3%
Coeur d'Alene, ID	5.3%
Boise City, ID	5.0%
Spokane, WA	4.4%
Grand Junction,…	4.3%
Twin Falls, ID	3.5%

U.S. Average: 3.0%

Source: U.S. Census American Community Survey 2017

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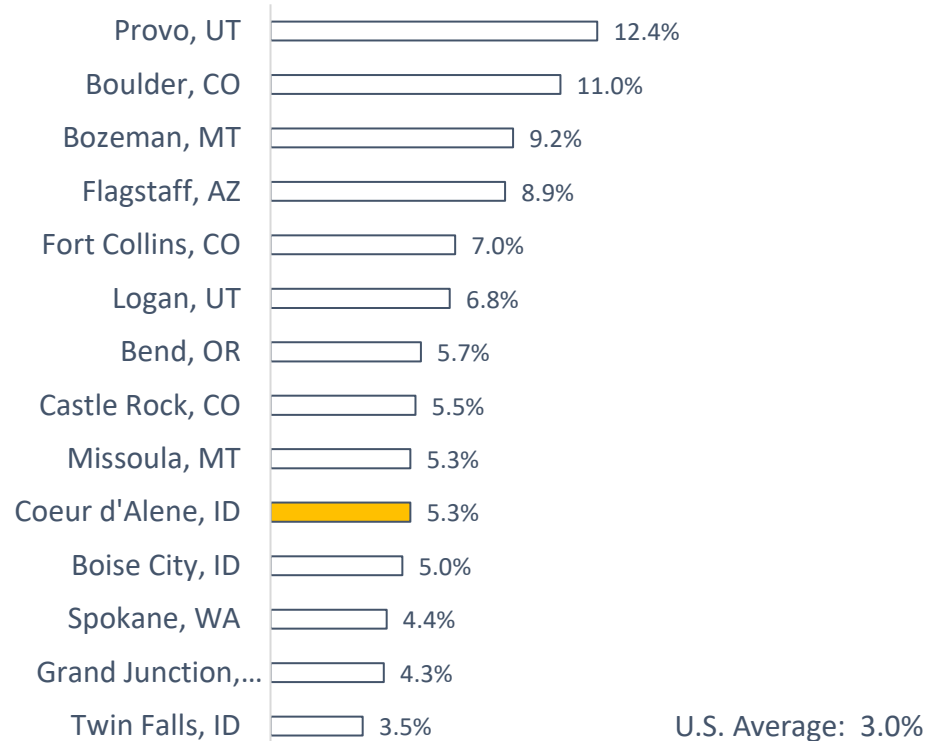
DEMOGRAPHICS

Racial and Ethnic Breakdown, 2017

Black/ African American, 0.6%

Native Hawaiian and Other Pacific Islander, 0.1%

Asian , 0.9%

Some Other Race, 0.6%

Native American , 1.7%

Two or More Races, 3.6%

White, 92.6%
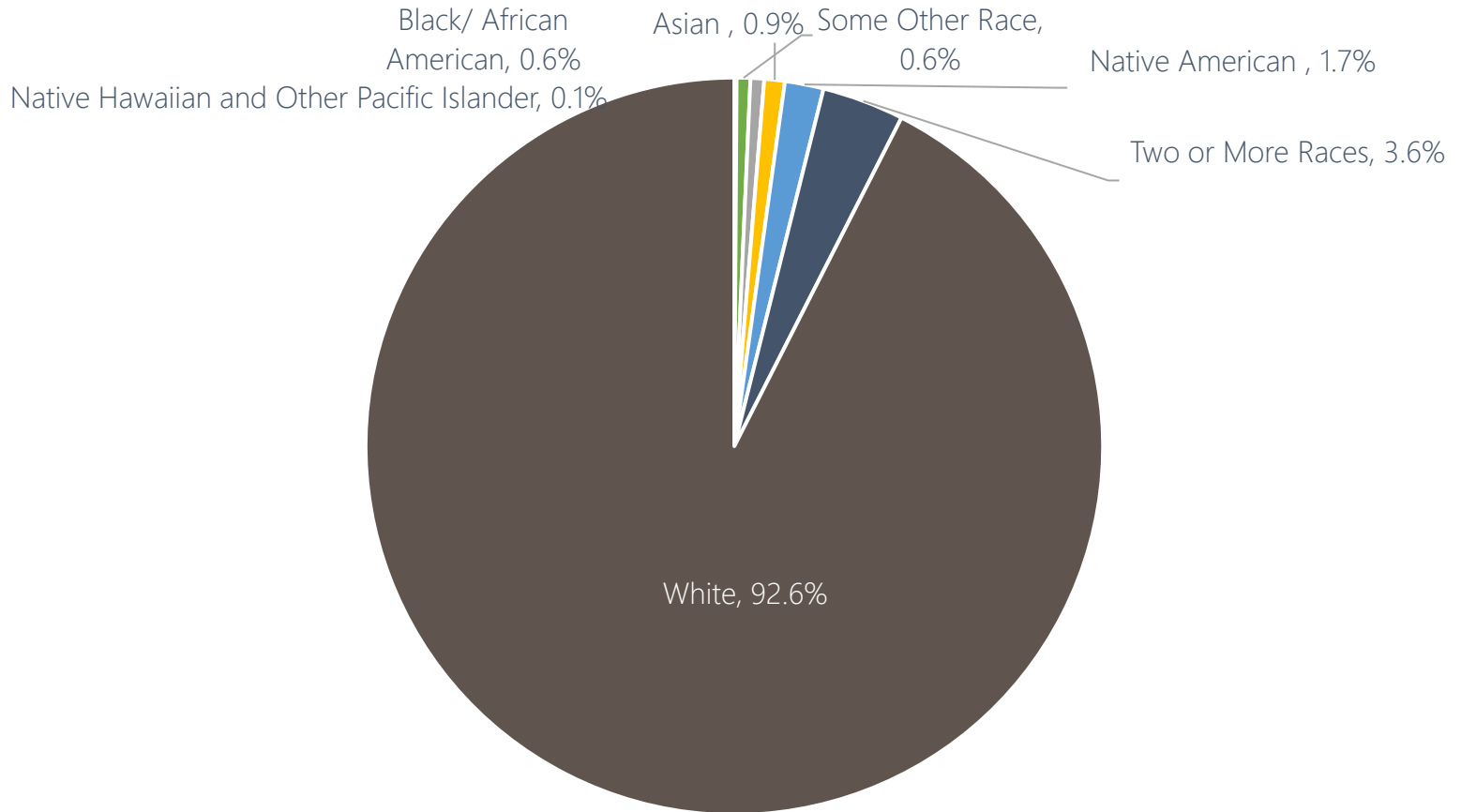
Source: U.S. Census American Community Survey 2017

DEMOGRAPHICS

Hispanic Population (Share of Residents), 2017

City	Percentage
Flagstaff, AZ	19.4%
Grand Junction,…	17.0%
Provo, UT	16.3%
Twin Falls, ID	16.1%
Logan, UT	15.1%
Fort Collins, CO	11.8%
Castle Rock, CO	10.2%
Boulder, CO	9.3%
Bend, OR	9.1%
Boise City, ID	8.7%
Spokane, WA	6.2%
Coeur d'Alene, ID	5.3%
Missoula, MT	3.1%
Bozeman, MT	2.8%

U.S. Average: 17.6%

Source: U.S. Census American Community Survey 2017

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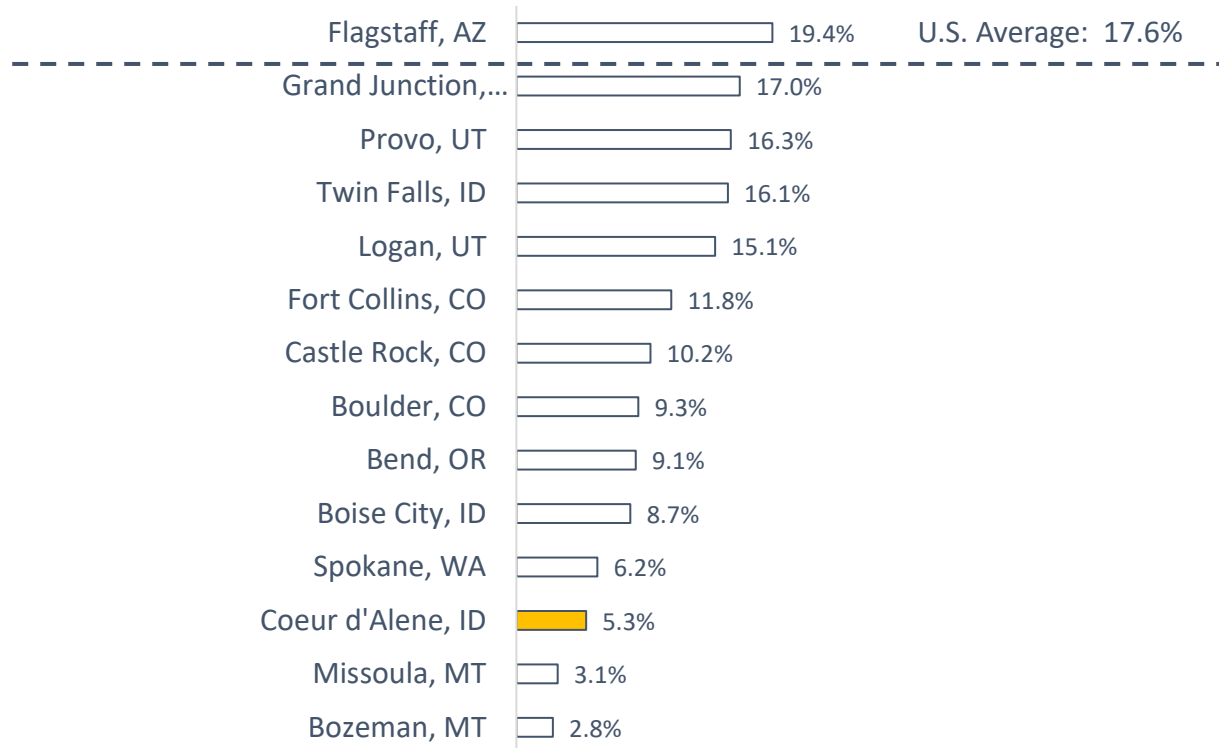
DEMOGRAPHICS

Foreign Born Population (Share of Residents), 2017

U.S. Average: 13.4%

City	Percentage
Boulder, CO	11.2%
Logan, UT	10.5%
Provo, UT	10.5%
Twin Falls, ID	9.9%
Boise City, ID	7.0%
Fort Collins, CO	6.4%
Spokane, WA	6.2%
Flagstaff, AZ	6.1%
Grand Junction,…	5.0%
Castle Rock, CO	4.5%
Bend, OR	4.4%
Bozeman, MT	4.1%
Missoula, MT	3.0%
Coeur d'Alene,…	2.3%
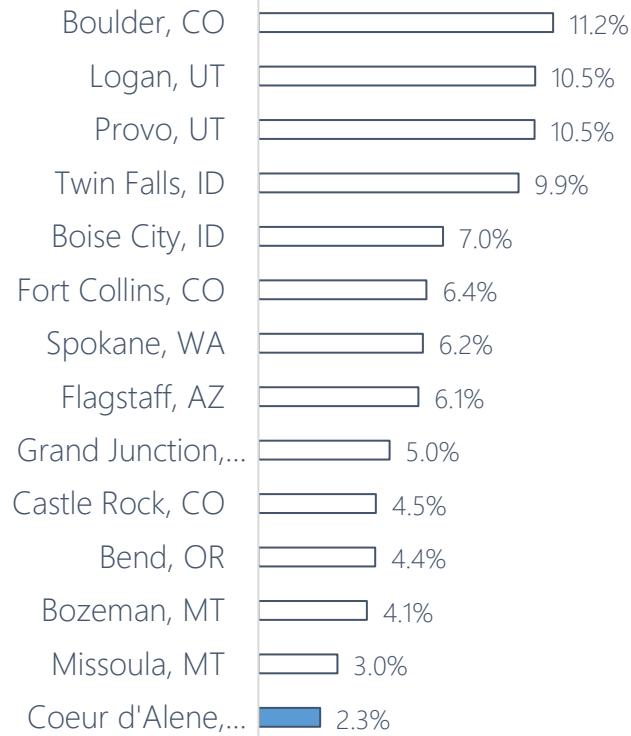
Source: U.S. Census American Community Survey 2017

INCOME

TAKEAWAYS

- **Median Household Income.**
  Coeur d'Alene's median household income has increased 18% (nearly 2x the U.S. average) since 2013 to approximately $47,606. This represents the largest increase for all benchmark cities.

- **Per Capita Income.**
  Coeur d'Alene's 's per capita income of $20,743 is 15% less than the national average and ranks ninth among the benchmark cities (on par with Spokane and Flagstaff).

- **Average Family Income.**
  Coeur d'Alene's average family income increased 19.3% (ranking first among cities) since 2013 to $43,806. This income level is still nearly 15% less than the U.S. average.

- **Men Median Wage.**
  Men working full-time in Coeur d'Alene earn approximately $43,800, ranking tenth among the benchmark cities.

- **Women Median Wage.**
  Women working full-time in Coeur d'Alene earn nearly $35,400 annually – 15% less than the U.S. average. This ranks tenth among the benchmarks.

INCOME

Median Household Income, 2017

City	Income
Castle Rock, CO	$101,122
Boulder, CO	$64,183
Bend, OR	$60,563
Fort Collins, CO	$60,110
Boise City, ID	$54,547
Flagstaff, AZ	$51,758
Bozeman, MT	$49,217
Grand Junction,…	$47,824
Coeur d'Alene, ID	$47,606
Twin Falls, ID	$46,283
Spokane, WA	$44,768
Provo, UT	$44,312
Missoula, MT	$43,602
Logan, UT	$38,412

U.S. Average: $57,652
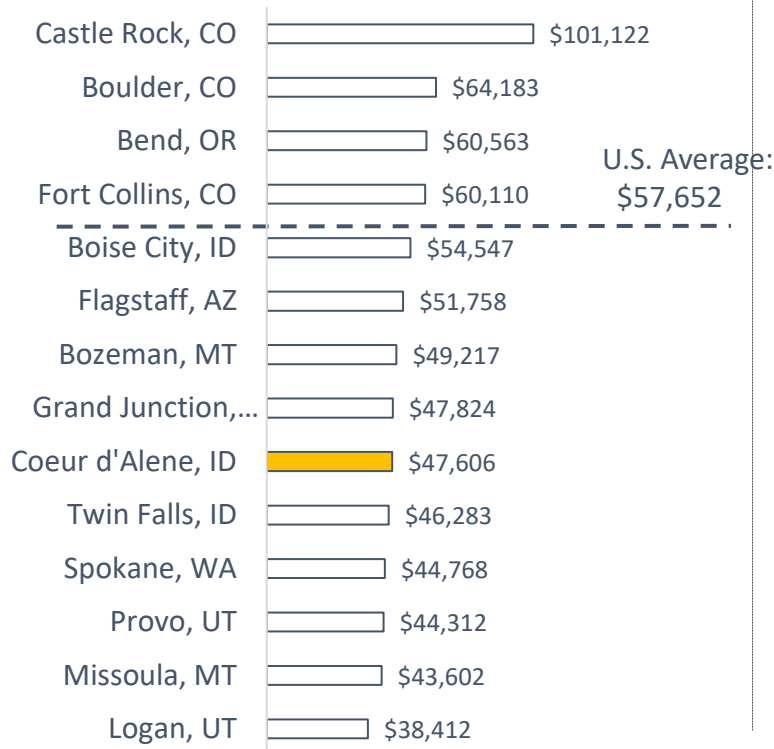
Source: U.S. Census American Community Survey 2017

Median Household Income 5-Year Growth, 2013-2017

City	Growth
Coeur d'Alene, ID	17.6%
Castle Rock, CO	17.2%
Bend, OR	14.2%
Boulder, CO	14.0%
Boise City, ID	12.4%
Fort Collins, CO	11.8%
Provo, UT	11.7%
Bozeman, MT	10.3%
Twin Falls, ID	9.0%
Missoula, MT	7.2%
Spokane, WA	6.4%
Logan, UT	6.3%
Flagstaff, AZ	4.0%
Grand Junction,…	2.1%

U.S. Average: 8.7%

Source: U.S. Census American Community Survey 2017-2013

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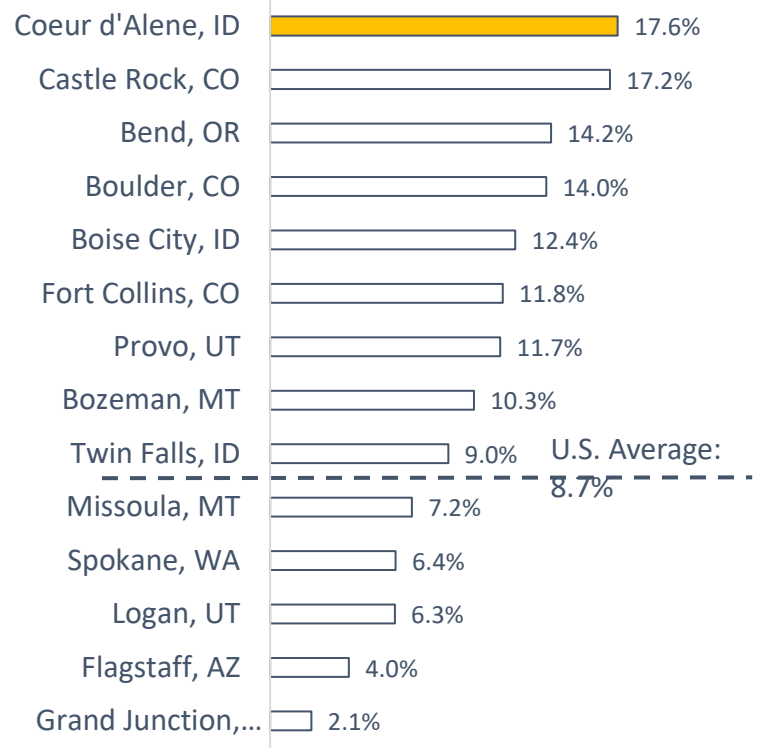
INCOME

Per Capita Income, 2017

City	Income
Boulder, CO	$40,895
Castle Rock, CO	$40,236
Bend, OR	$33,619
Boise City, ID	$32,147
Fort Collins, CO	$31,686
Bozeman, MT	$29,097
Missoula, MT	$28,426
Grand Junction,...	$27,475
Coeur d'Alene, ID	$26,586
Spokane, WA	$26,464
Flagstaff, AZ	$25,738
Twin Falls, ID	$21,704
Provo, UT	$19,385
Logan, UT	$17,870

U.S. Average: $31,177
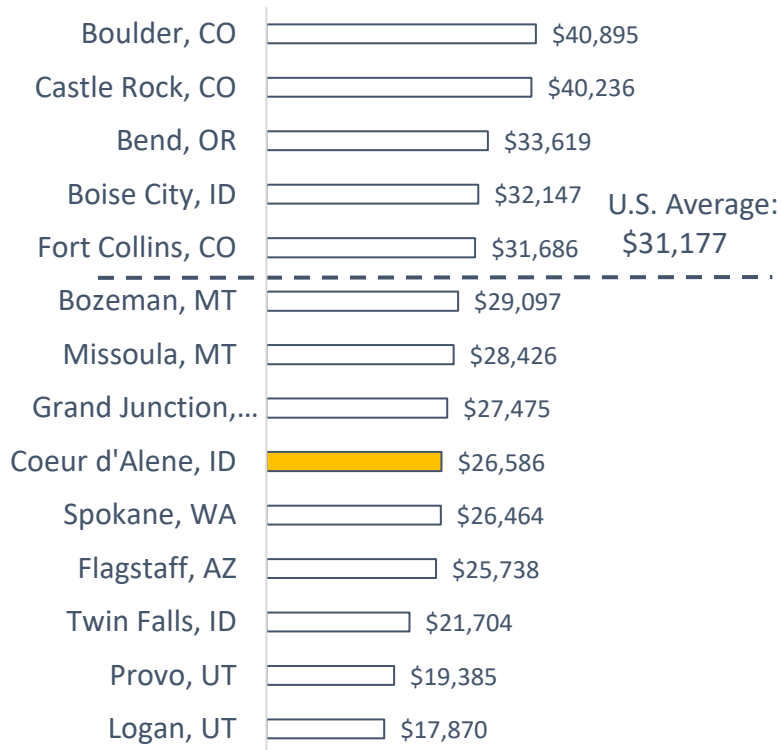
Source: U.S. Census American Community Survey 2017

Per Capita Income 5-Year Growth, 2013-2017

City	Growth
Coeur d'Alene, ID	18.0%
Boise City, ID	14.9%
Castle Rock, CO	14.4%
Missoula, MT	14.2%
Provo, UT	14.2%
Bend, OR	13.4%
Twin Falls, ID	12.7%
Bozeman, MT	10.5%
Spokane, WA	10.4%
Fort Collins, CO	10.3%
Boulder, CO	9.7%
Flagstaff, AZ	5.2%
Logan, UT	4.7%
Grand Junction,...	2.5%

U.S. Average: 10.7%

Source: U.S. Census American Community Survey 2017-2013

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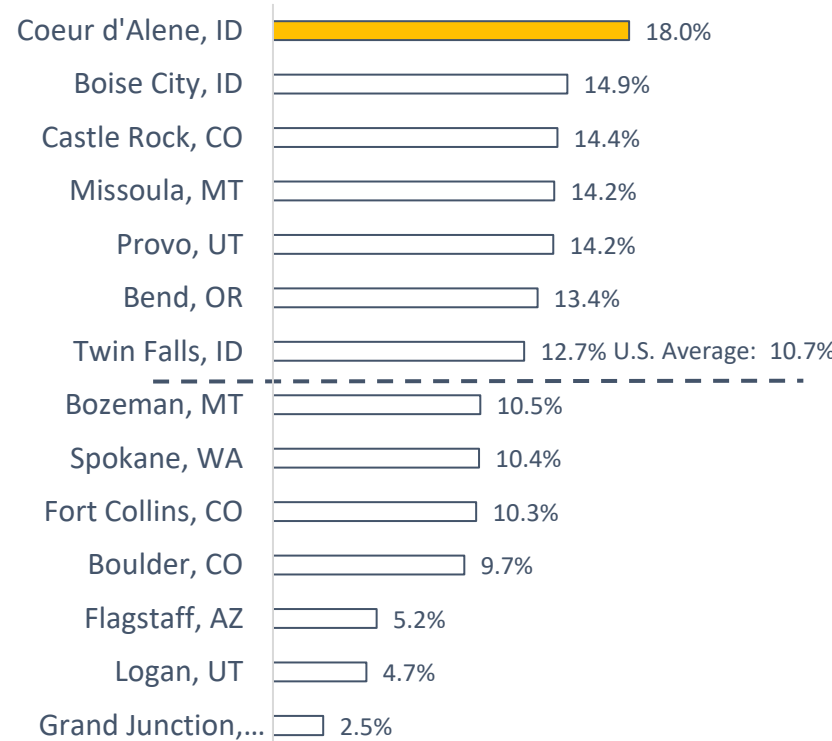
INCOME

Average Family Income, 2017

City	Income
Boulder, CO	$146,381
Castle Rock, CO	$130,158
Fort Collins, CO	$104,631
Boise City, ID	$98,756
Bozeman, MT	$96,821
Flagstaff, AZ	$95,213
Bend, OR	$93,855
Missoula, MT	$88,078
Grand Junction,…	$80,323
Spokane, WA	$77,000
Coeur d'Alene, ID	$75,127
Provo, UT	$71,812
Twin Falls, ID	$65,580
Logan, UT	$59,965

U.S. Average: $95,031
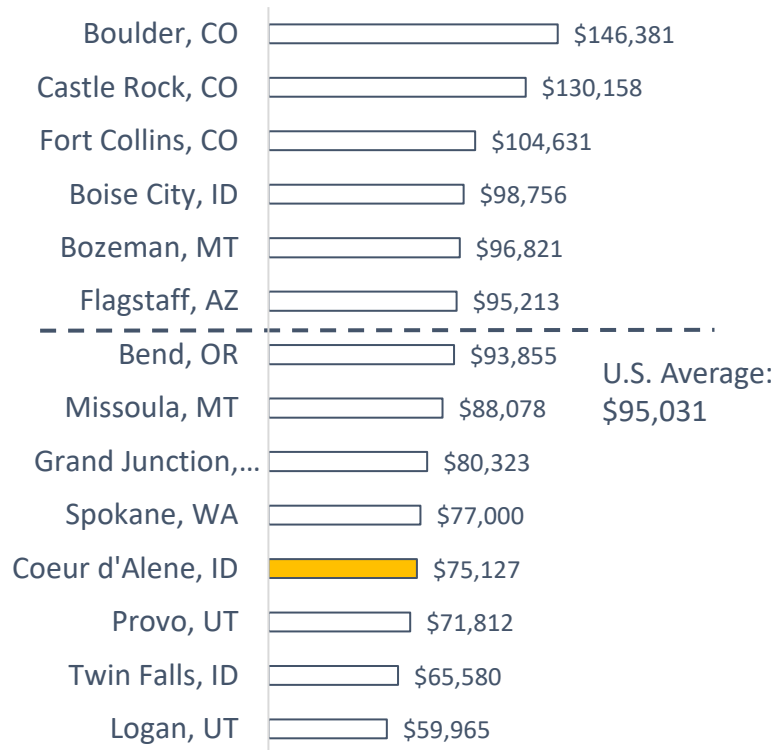
Source: U.S. Census American Community Survey 2017

Average Family Income 5-Year Growth, 2013-2017

City	Growth
Coeur d'Alene, ID	19.3%
Boise City, ID	19.0%
Twin Falls, ID	15.9%
Castle Rock, CO	15.8%
Missoula, MT	14.7%
Bozeman, MT	13.8%
Flagstaff, AZ	13.0%
Spokane, WA	11.1%
Bend, OR	11.0%
Fort Collins, CO	10.8%
Provo, UT	10.5%
Boulder, CO	7.8%
Logan, UT	6.4%
Grand Junction,…	2.0%

U.S. Average: 11.0%

Source: U.S. Census American Community Survey 2017-2013

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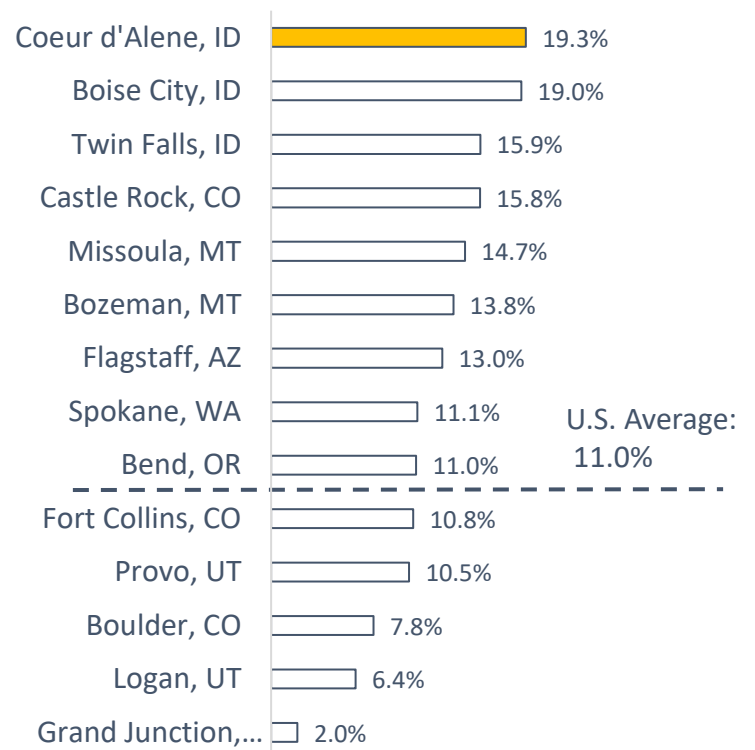
INCOME

Men: Median Full-Time Earning, 2017

City	Earning
Castle Rock, CO	$76,591
Boulder, CO	$61,882
Fort Collins, CO	$51,870
Grand Junction,…	$50,955
Bend, OR	$50,332
Boise City, ID	$48,875
Spokane, WA	$45,585
Flagstaff, AZ	$45,302
Coeur d'Alene, ID	$43,806
Bozeman, MT	$41,704
Twin Falls, ID	$41,079
Missoula, MT	$40,546
Provo, UT	$38,473
Logan, UT	$35,639

U.S. Average: $50,859
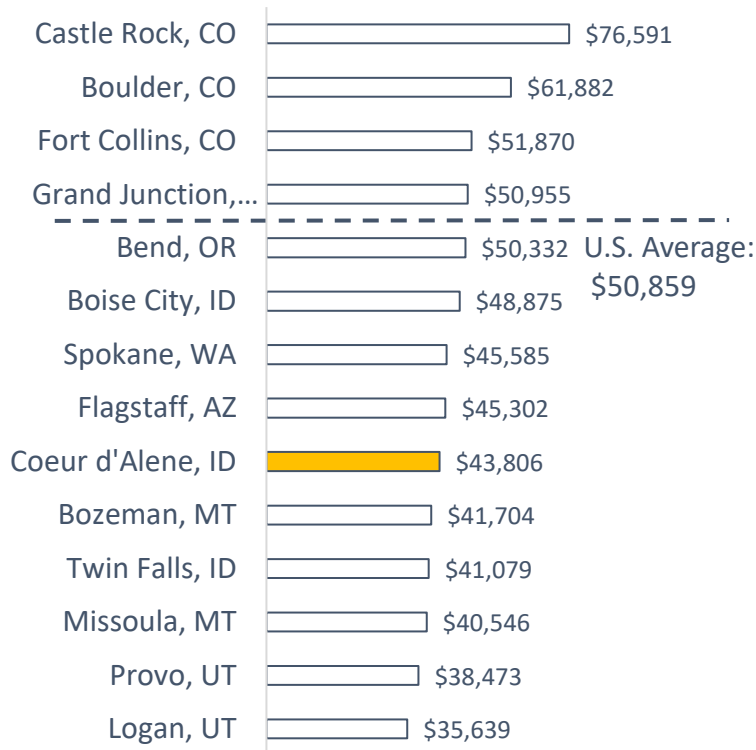
Source: U.S. Census American Community Survey 2017

Men: Median Full-Time Earning 5-Year Growth, 2013-2017

City	Growth
Logan, UT	11.8%
Bend, OR	7.7%
Twin Falls, ID	7.6%
Boise City, ID	7.5%
Flagstaff, AZ	6.6%
Coeur d'Alene, ID	6.2%
Spokane, WA	4.5%
Bozeman, MT	4.2%
Grand Junction, CO	3.7%
Castle Rock, CO	2.5%
Missoula, MT	1.2%
Fort Collins, CO	0.3%
Boulder, CO	-1.3%
Provo, UT	-4.7%

U.S. Average: 3.6%

Source: U.S. Census American Community Survey 2017-2013

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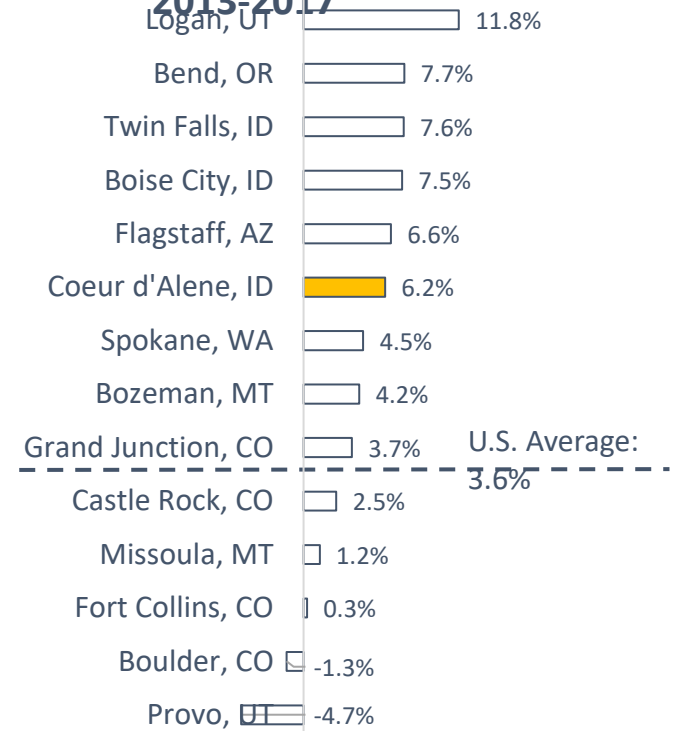
INCOME

Women: Median Full-Time Earning, 2017

City	Earning
Castle Rock, CO	$53,094
Boulder, CO	$52,146
Fort Collins, CO	$40,968
Boise City, ID	$39,920
Bend, OR	$39,110
Grand Junction,…	$38,481
Bozeman, MT	$37,960
Spokane, WA	$36,861
Flagstaff, AZ	$36,737
Coeur d'Alene, ID	$35,408
Missoula, MT	$32,135
Provo, UT	$28,794
Twin Falls, ID	$28,744
Logan, UT	$28,161

U.S. Average: $40,760
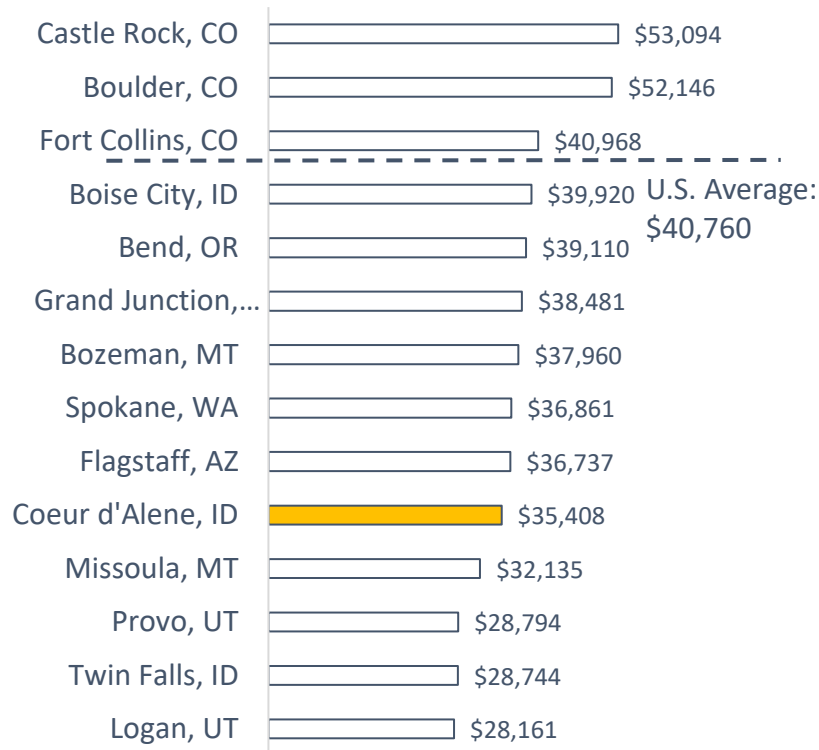
Source: U.S. Census American Community Survey 2017

Women: Median Full-Time Earning 5-Year Growth, 2013-2017

City	Growth
Coeur d'Alene, ID	18.5%
Bozeman, MT	18.2%
Boulder, CO	11.0%
Castle Rock, CO	8.1%
Bend, OR	7.2%
Boise City, ID	7.0%
Logan, UT	6.9%
Spokane, WA	5.4%
Twin Falls, ID	5.3%
Fort Collins, CO	4.3%
Grand Junction, CO	4.0%
Provo, UT	2.5%
Missoula, MT	1.6%
Flagstaff, AZ	-1.9%
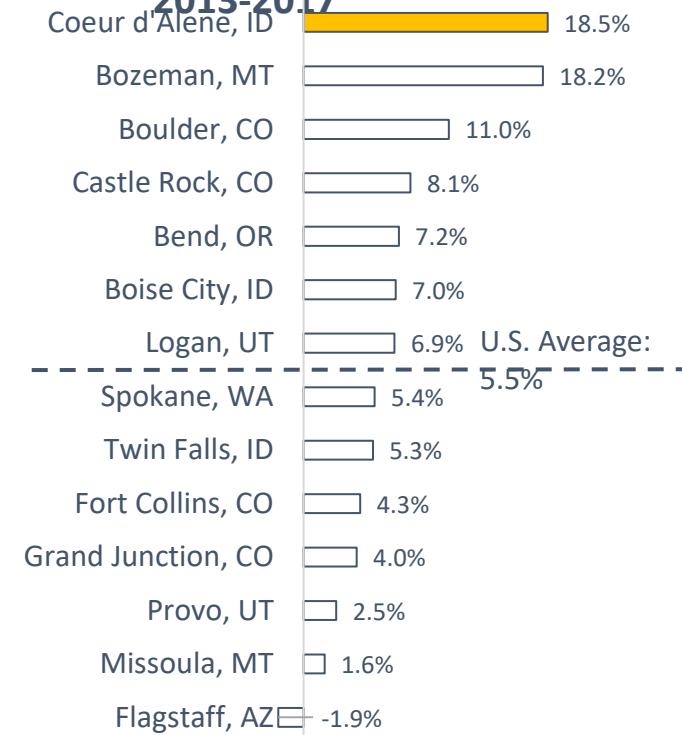
U.S. Average: 5.5%

Source: U.S. Census American Community Survey 2017-2013

INCLUSIVE PROSPERITY

TAKEAWAYS

- **Poverty Levels.**
Coeur d'Alene's poverty levels are above the U.S. average: 12.4% of all families live below the poverty line and 20.5% of those with children. This ranks the city third highest among the benchmark cities.

- **Health Insurance.**
Nearly 13% of Coeur d'Alene's population does not have health insurance. This ranks third among the benchmarks.

- **Cash Public Assistance.**
Five percent of Coeur d'Alene's population receives cash public assistance; this is two times the U.S. average.

- **SNAP and Food Stamp Benefits.**
Fourteen percent of Coeur d'Alene's population receives SNAP or food stamp benefits. This ranks third among the benchmarks.

- **Housing Values.**
With a housing value of $316,000, Coeur d'Alene is one of the most affordable communities among the benchmark cities; less than one-third of homeowners spend more than 30% of their income on housing.

- **Gross Rent.**
Coeur d'Alene's monthly gross rent is $882 – 11% less than the U.S. average. Forty-four percent of the city's renters pay more than 30% of their monthly income on housing costs.

INCLUSIVE PROSPERITY

Share of All Families Living Below the Poverty Line, 2017

City	%
Logan, UT	18.1%
Provo, UT	16.3%
Grand Junction,…	13.3%
Spokane, WA	12.8%
Coeur d'Alene, ID	12.4%
Twin Falls, ID	12.2%
Flagstaff, AZ	10.4%
Missoula, MT	10.2%
Boise City, ID	8.0%
Bend, OR	7.1%
Bozeman, MT	6.8%
Fort Collins, CO	6.4%
Boulder, CO	5.6%
Castle Rock, CO	3.1%

U.S. Average: 10.5%
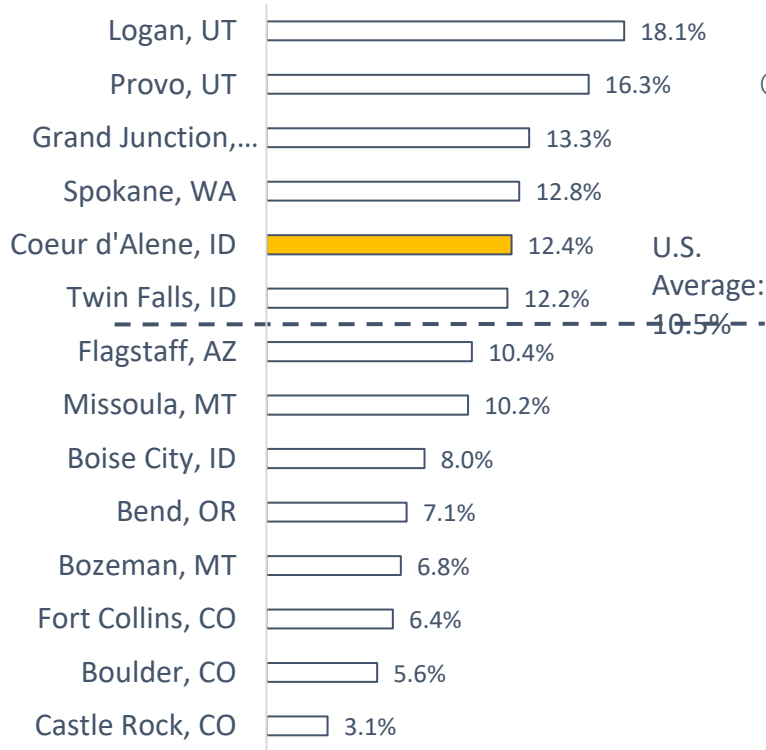
Source: U.S. Census American Community Survey 2017

Share of Families with Children Living Below the Poverty Line 2017

City	%
Logan, UT	24.4%
Grand Junction, CO	21.6%
Coeur d'Alene, ID	20.5%
Spokane, WA	20.4%
Twin Falls, ID	18.0%
Provo, UT	16.9%
Missoula, MT	16.9%
Flagstaff, AZ	16.5%
Boise City, ID	13.4%
Bend, OR	10.2%
Bozeman, MT	9.8%
Fort Collins, CO	9.1%
Boulder, CO	7.5%
Castle Rock, CO	3.9%

U.S. Average: 16.7%
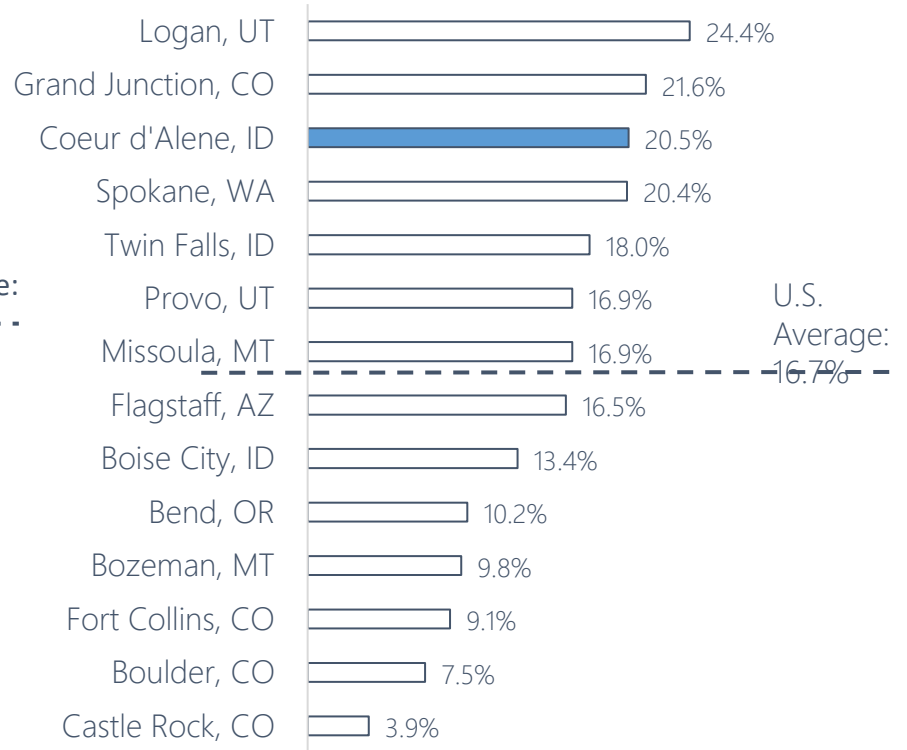
Source: U.S. Census American Community Survey 2017

INCLUSIVE PROSPERITY

Share of Residents with No Health Insurance, 2017
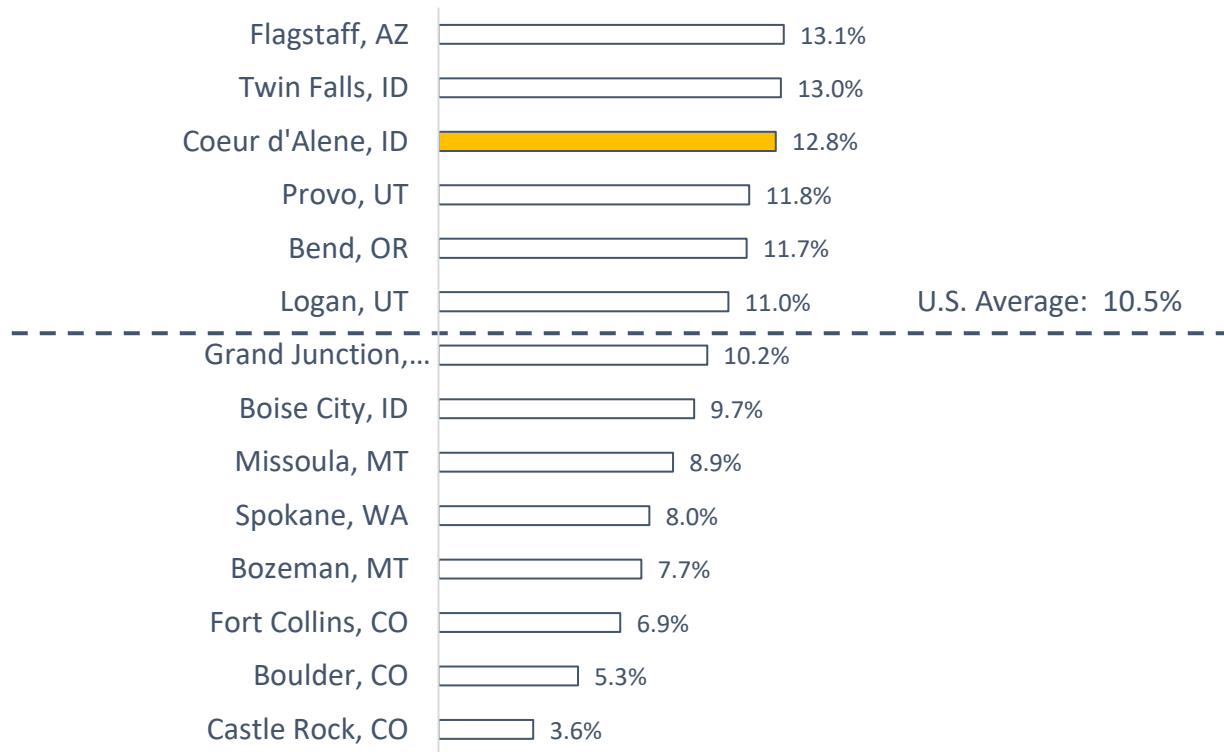
City	Percentage
Flagstaff, AZ	13.1%
Twin Falls, ID	13.0%
Coeur d'Alene, ID	12.8%
Provo, UT	11.8%
Bend, OR	11.7%
Logan, UT	11.0%
Grand Junction,…	10.2%
Boise City, ID	9.7%
Missoula, MT	8.9%
Spokane, WA	8.0%
Bozeman, MT	7.7%
Fort Collins, CO	6.9%
Boulder, CO	5.3%
Castle Rock, CO	3.6%

U.S. Average: 10.5%

Source: U.S. Census American Community Survey 2017

INCLUSIVE PROSPERITY

**Share of Households Receiving
Cash Public Assistance, 2017**
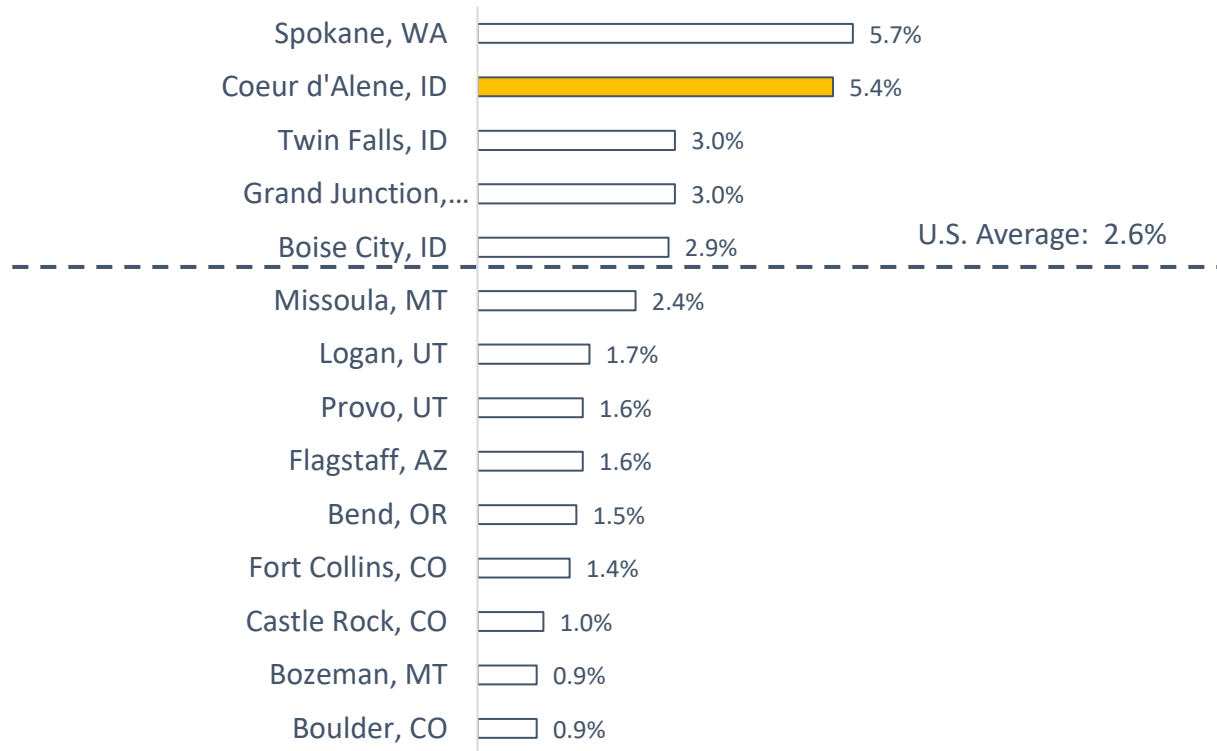
City	%
Spokane, WA	5.7%
Coeur d'Alene, ID	5.4%
Twin Falls, ID	3.0%
Grand Junction,…	3.0%
Boise City, ID	2.9%
Missoula, MT	2.4%
Logan, UT	1.7%
Provo, UT	1.6%
Flagstaff, AZ	1.6%
Bend, OR	1.5%
Fort Collins, CO	1.4%
Castle Rock, CO	1.0%
Bozeman, MT	0.9%
Boulder, CO	0.9%

U.S. Average: 2.6%

Source: U.S. Census American Community Survey 2017

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INCLUSIVE PROSPERITY

Share of Households Receiving SNAP or Food Stamp Benefits, 2017

City	Percent
Spokane, WA	23.0%
Bend, OR	14.7%
Coeur d'Alene, ID	14.3%
Missoula, MT	14.0%
Twin Falls, ID	12.8%
Grand Junction,…	11.7%
Logan, UT	11.0%
Flagstaff, AZ	10.0%
Boise City, ID	9.5%
Provo, UT	9.3%
Fort Collins, CO	6.8%
Boulder, CO	4.2%
Bozeman, MT	3.8%
Castle Rock, CO	3.0%

U.S. Average: 12.6%
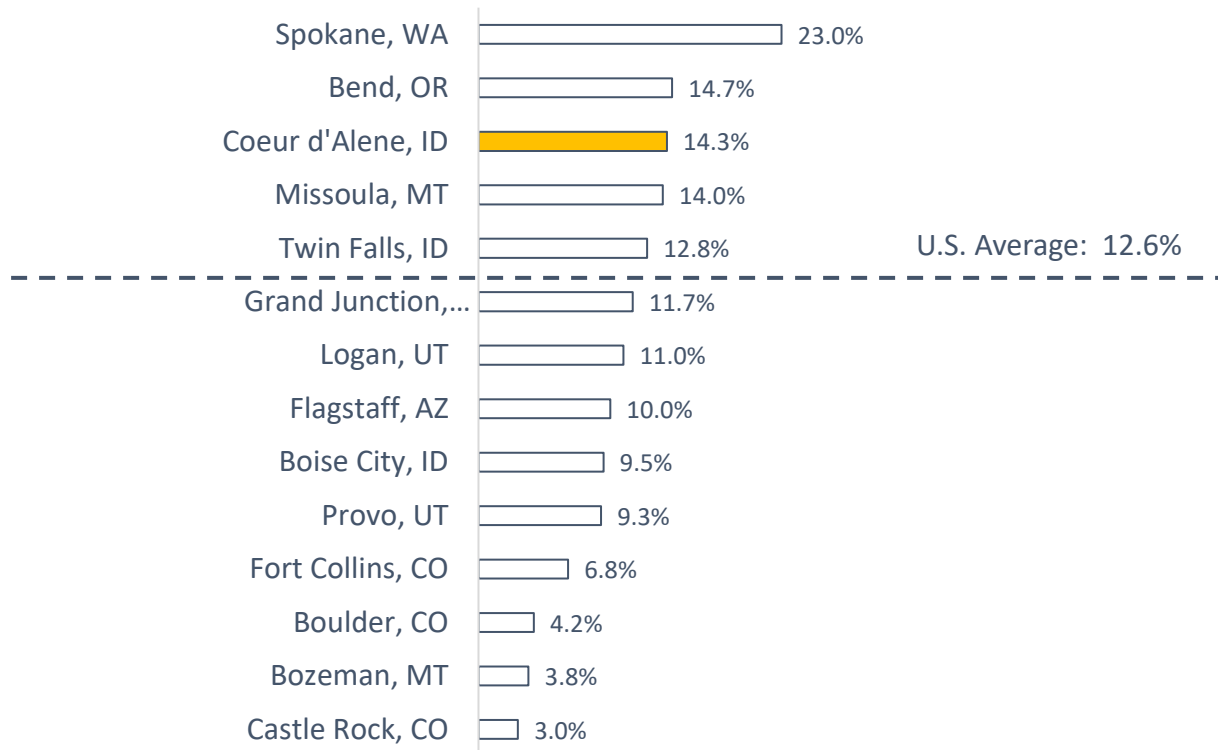
Source: U.S. Census American Community Survey 2017

INCLUSIVE PROSPERITY

Median Housing Value, 2017

City	Value
Boulder, CO	$819,200
Castle Rock, CO	$486,000
Bend, OR	$443,800
Bozeman, MT	$439,700
Fort Collins, CO	$404,500
Flagstaff, AZ	$372,600
Provo, UT	$324,500
Coeur d'Alene, ID	$316,900
Missoula, MT	$302,900
Boise City, ID	$290,500
Grand Junction,…	$240,700
Logan, UT	$225,600
Spokane, WA	$205,700
Twin Falls, ID	$197,200
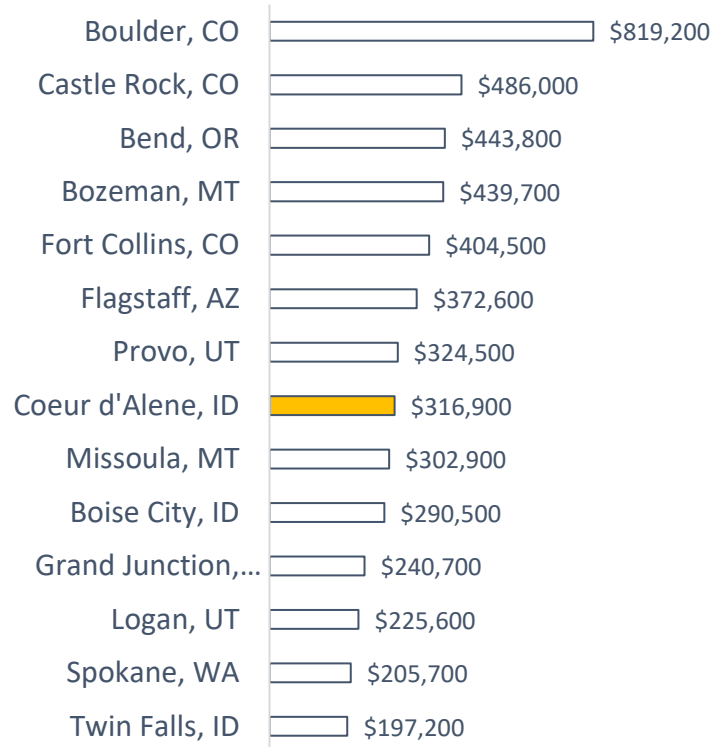
Source: Zillow 2018

INCLUSIVE PROSPERITY

Median Gross Rent, 2017

City	Median Gross Rent
Castle Rock, CO	$1,430
Boulder, CO	$1,412
Fort Collins, CO	$1,191
Flagstaff, AZ	$1,138
Bend, OR	$1,107
Bozeman, MT	$956
Grand Junction,…	$888
Coeur d'Alene, ID	$882
Boise City, ID	$875
Spokane, WA	$805
Provo, UT	$793
Missoula, MT	$785
Twin Falls, ID	$757
Logan, UT	$694

U.S. Average: $982
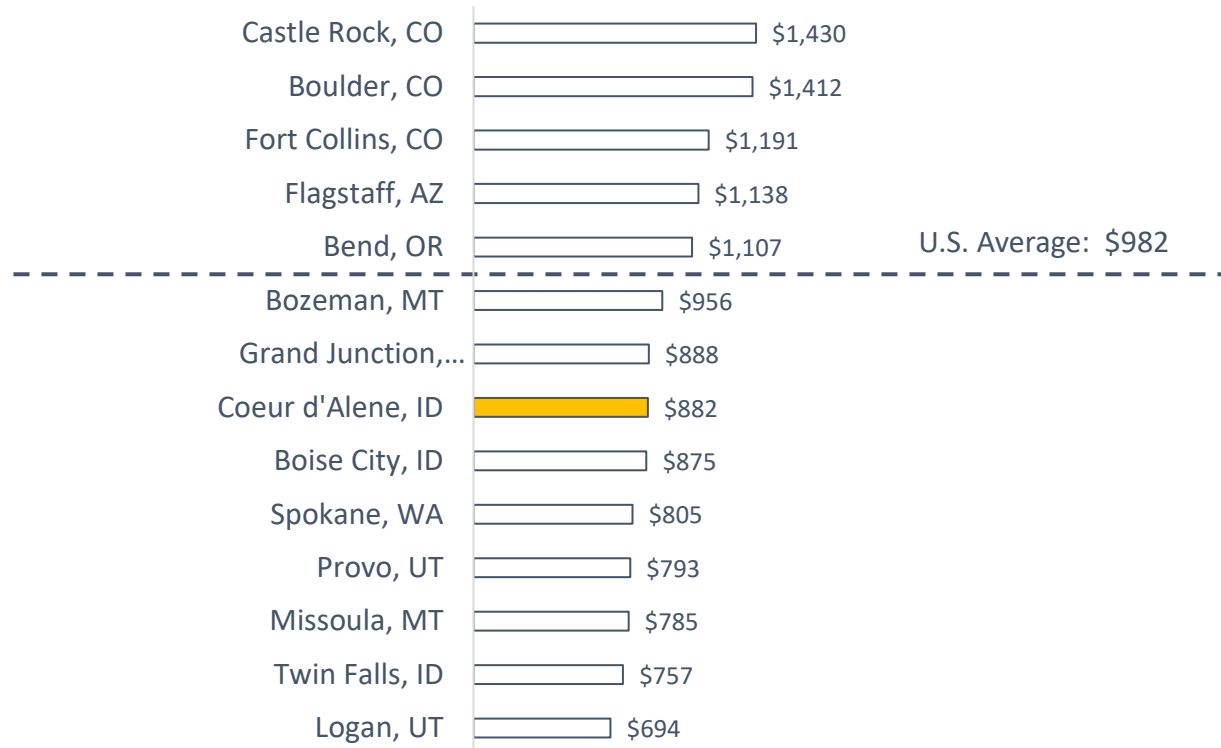
Source: U.S. Census American Community Survey 2017

INCLUSIVE PROSPERITY

% of Households with a Mortgage Who's Monthly Costs is 30% or More of Household Income, 2017

City	%
Bend, OR	34.5%
Missoula, MT	30.1%
Spokane, WA	30.0%
Boulder, CO	29.5%
Grand Junction,…	29.4%
Flagstaff, AZ	29.0%
Provo, UT	28.9%
Coeur d'Alene, ID	27.3%
Bozeman, MT	27.1%
Twin Falls, ID	26.2%
Logan, UT	26.0%
Fort Collins, CO	24.5%
Castle Rock, CO	23.8%
Boise City, ID	23.3%

U.S. Average: 29.5%

Source: U.S. Census American Community Survey 2017

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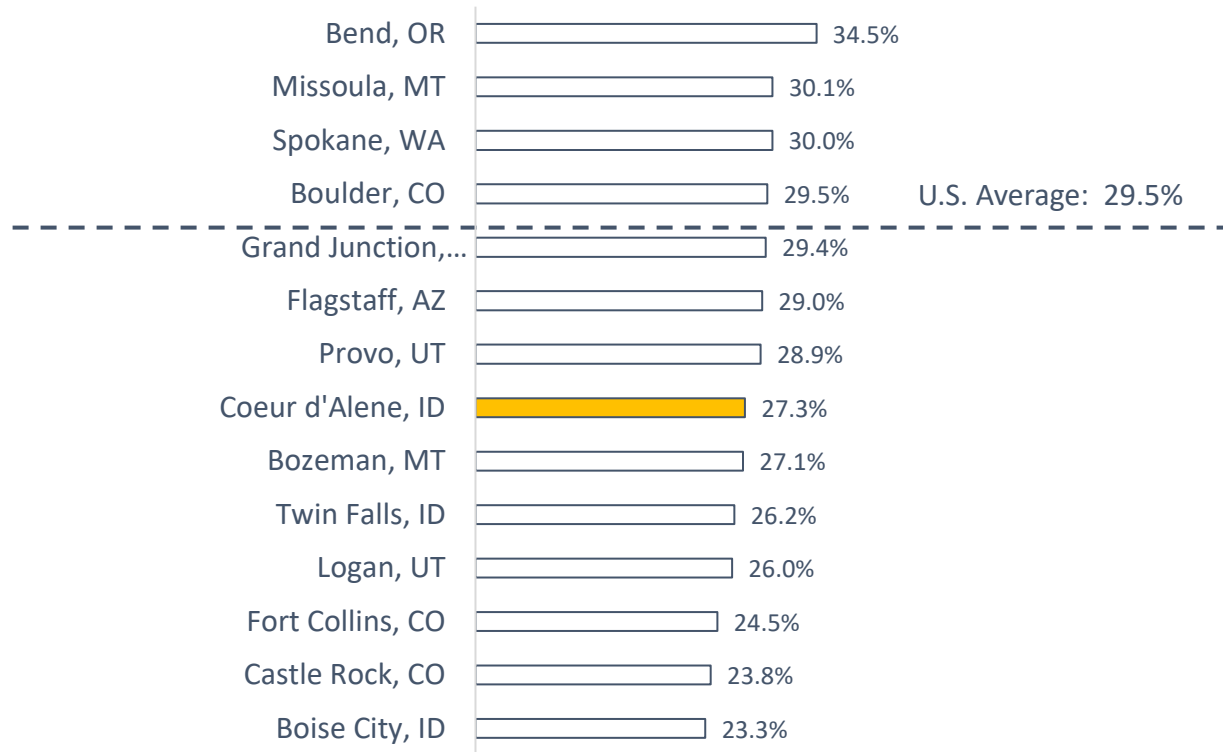
INCLUSIVE PROSPERITY

% of Households Who's Gross Rent is 30% or More of Household Income, 2017

City	%
Fort Collins, CO	60.1%
Boulder, CO	59.7%
Flagstaff, AZ	57.5%
Grand Junction,…	57.0%
Bozeman, MT	55.3%
Provo, UT	53.5%
Spokane, WA	52.7%
Bend, OR	52.3%
Missoula, MT	51.5%
Logan, UT	48.5%
Twin Falls, ID	46.5%
Boise City, ID	46.3%
Coeur d'Alene, ID	44.7%
Castle Rock, CO	44.2%

U.S. Average: 50.6%
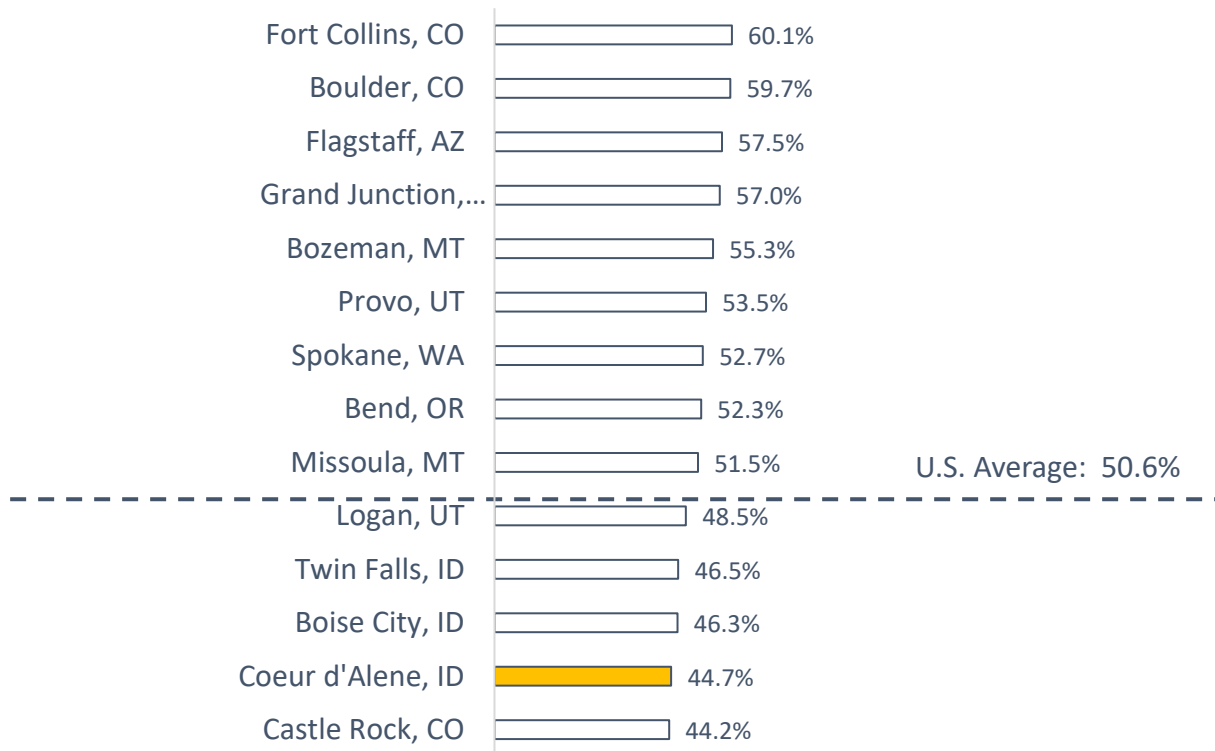
Source: U.S. Census American Community Survey 2017

EDUCATIONAL ATTAINMENT

TAKEAWAYS

- **No High School Diploma.**
  Approximately 2,500 Coeur d'Alene residents (25 or older) do not have a high school diploma – nearly 8% of the workforce. This ranks fourth highest among the benchmark cities, on par with Spokane and Provo.

- **High School Diploma.**
  Twenty-five percent of Coeur d'Alene 's workforce only has a high school diploma, ranking second among the benchmark cities.

- **Associate's Degree.**
  Four in ten Coeur d'Alene residents (25 or older) has an associate's degree or some college; this ranks second among the benchmarks. The community has experienced a 17% increase in the level of this talent base.

- **Bachelor's Degree or Higher.**
  Nearly 8,700 Coeur d'Alene residents bachelor's degree or higher, 26.8% of the workforce and less than the U.S. average (30.9%). Since 2013, the number of residents with a BA or higher in Coeur d'Alene has increased 23%, ranking third among the community comparisons.

EDUCATIONAL ATTAINMENT

Degree Breakdown, 2017

- Graduate Degree
- No High School
- Bachelor's Degree
- High School Diploma
- Some College or Associate's Degree
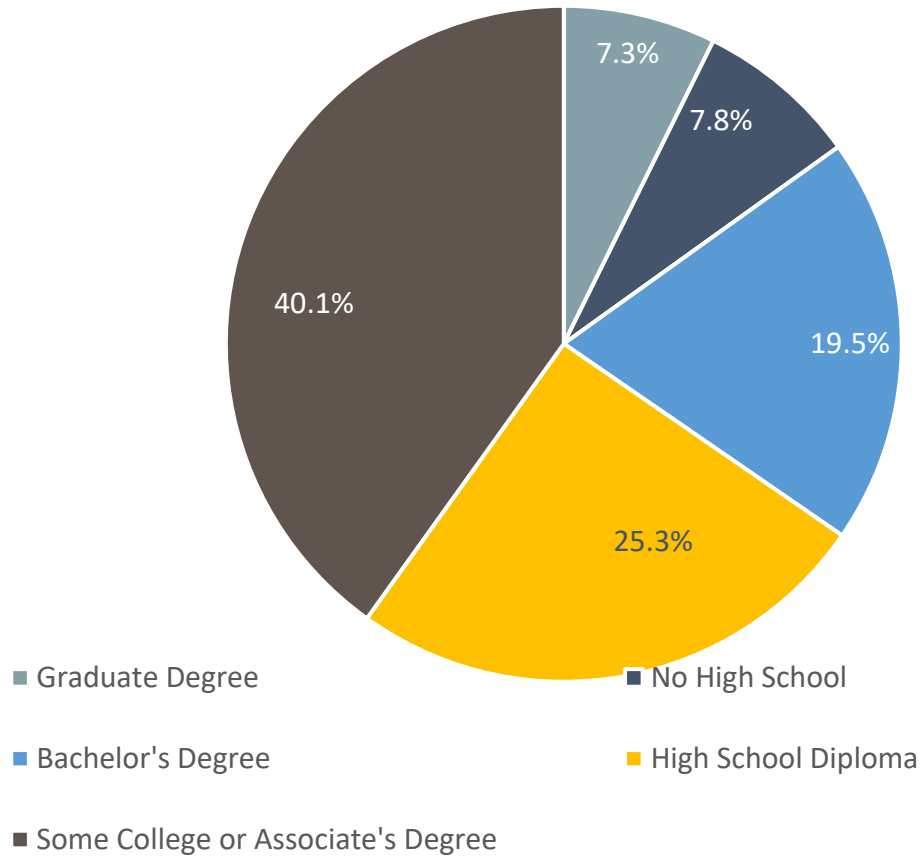
Source: U.S. Census American Community Survey 2017

EDUCATIONAL ATTAINMENT

**No High School Diploma
(% of Residents),
2017**

U.S. Average: 12.7%

City	%
Twin Falls, ID	11.5%
Logan, UT	9.8%
Grand Junction,…	9.3%
Coeur d'Alene, ID	7.8%
Spokane, WA	7.7%
Provo, UT	7.6%
Flagstaff, AZ	6.9%
Boise City, ID	5.6%
Bend, OR	4.9%
Missoula, MT	4.3%
Fort Collins, CO	3.6%
Boulder, CO	3.5%
Castle Rock, CO	2.5%
Bozeman, MT	1.9%

Source: U.S. Census American Community Survey 2017

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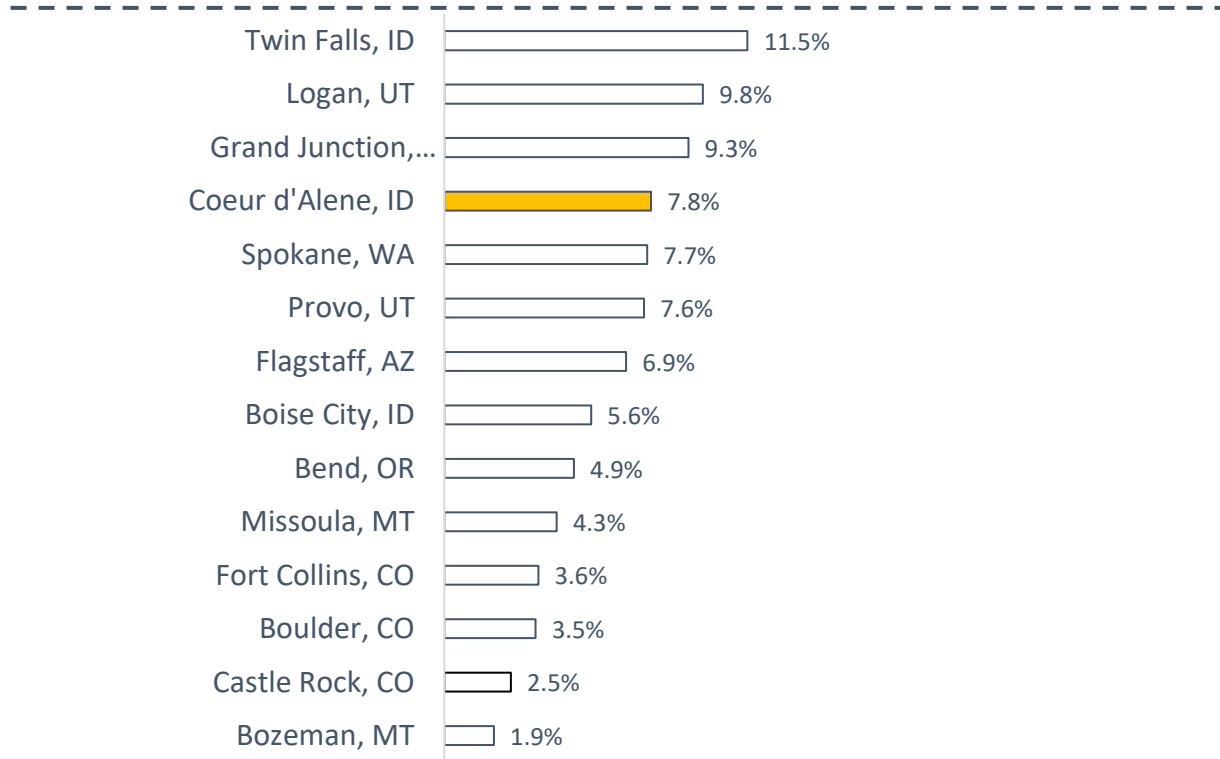
EDUCATIONAL ATTAINMENT

**High School Diploma
(% of Residents),
2017**

U.S. Average: 27.3%

City	%
Twin Falls, ID	28.8%
Coeur d'Alene, ID	25.3%
Grand Junction,…	25.2%
Spokane, WA	24.6%
Boise City, ID	20.7%
Logan, UT	19.7%
Missoula, MT	17.8%
Bend, OR	17.7%
Flagstaff, AZ	16.1%
Fort Collins, CO	15.2%
Castle Rock, CO	14.6%
Provo, UT	14.3%
Bozeman, MT	13.3%
Boulder, CO	7.1%
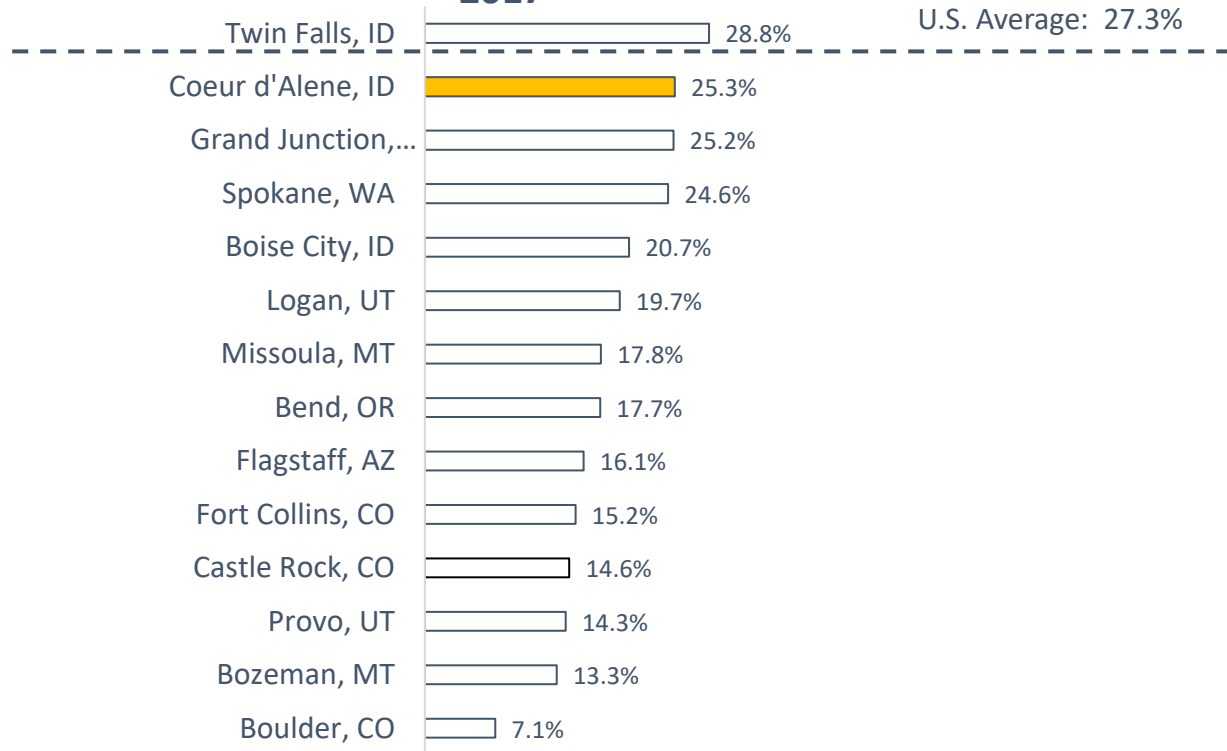
Source: U.S. Census American Community Survey
2017

EDUCATIONAL ATTAINMENT

**Some College or Associate's Degree
(% of Residents),
2017**

City	%
Twin Falls, ID	40.3%
Coeur d'Alene, ID	40.1%
Spokane, WA	38.2%
Provo, UT	35.7%
Bend, OR	34.8%
Logan, UT	34.7%
Castle Rock, CO	34.0%
Boise City, ID	32.8%
Grand Junction,…	32.7%
Flagstaff, AZ	31.9%
Missoula, MT	30.5%
Bozeman, MT	27.9%
Fort Collins, CO	27.5%
Boulder, CO	15.6%

U.S. Average: 29.1%
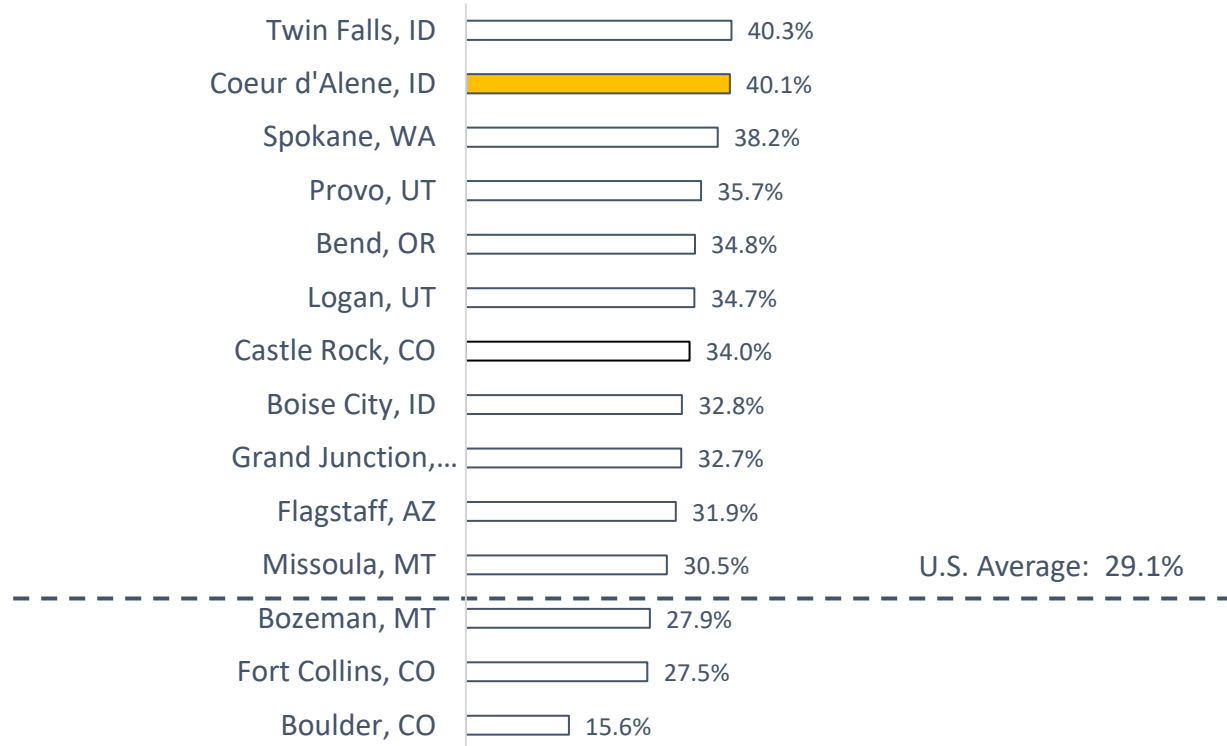
Source: U.S. Census American Community Survey 2017

EDUCATIONAL ATTAINMENT

Bachelor's Degree or Higher
(% of Residents),
2017

City	%
Boulder, CO	73.8%
Bozeman, MT	56.9%
Fort Collins, CO	53.6%
Castle Rock, CO	48.9%
Missoula, MT	47.4%
Flagstaff, AZ	45.1%
Bend, OR	42.6%
Provo, UT	42.5%
Boise City, ID	40.9%
Logan, UT	35.7%
Grand Junction, CO	32.9%
Spokane, WA	29.5%
Coeur d'Alene, ID	26.8%
Twin Falls, ID	19.4%

U.S. Average: 30.9%
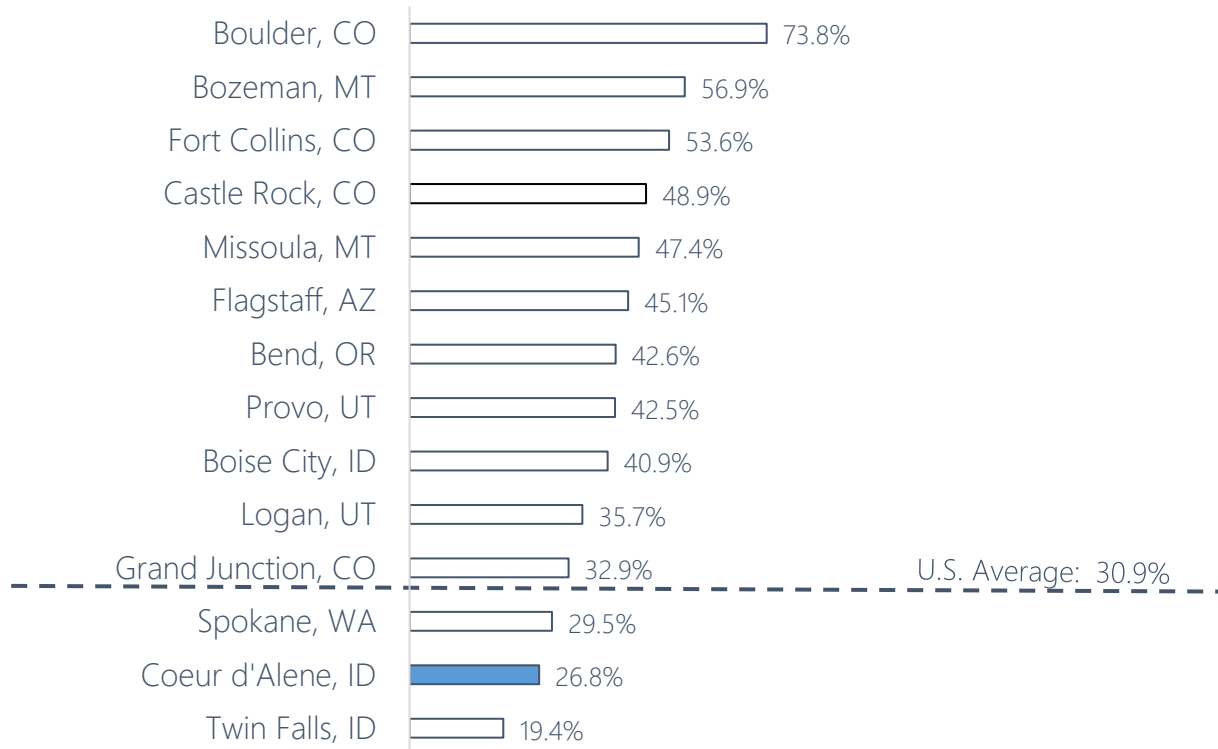
Source: U.S. Census American Community Survey 2017

BUSINESS ESTABLISHMENTS

TAKEAWAYS

- **Growth in Business Establishments.**
  From 2012 to 2016, Coeur d'Alene experienced a 7.5% increase in the number of business establishments, while the U.S. experienced a 4.4% increase. Coeur d'Alene 's growth is comparable to Boulder and Missoula.

- **Construction.**
  Construction establishments make up 15.5% of all Coeur d'Alene businesses (the largest share)l; the sector experienced a 16% increase in number of businesses since 2012.

- **Retail and Hospitality Businesses.**
  Retail businesses make up the second largest share (12.5%) of Coeur d'Alene businesses. Combined with those establishments in hospitality (accommodation and food service), the share grows to more than 20%.

- **Manufacturing.**
  With 325 manufacturing establishments, Coeur d'Alene's share of manufacturing businesses ranks second among the benchmark cities, just behind Logan and nearly two times the U.S. average. The number of these establishments is 14% since 2012.

- **Professional Services.**
  Professional services businesses account for 10.6% Coeur d'Alene's business establishments, slightly below the U.S. average and eleventh among the benchmarks.

BUSINESS ESTABLISHMENTS

Coeur d'Alene Business Establishments, 2016

Category	Percentage
Construction	15.5%
Retail Trade	12.5%
Health Care and Social Assistance	10.8%
Professional Services	10.6%
Accommodation and Food Services	8.4%
Other Services	7.3%
Finance and Insurance	5.9%
Real Estate and Rental and Leasing	5.7%
Manufacturiing	5.2%
Administrative and Support	5.2%
Wholesale Trade	3.5%
Transportation and Warehousing	2.3%
Arts, Entertainment and Recreation	2.0%
Information	1.5%
Educational Services	1.3%
Agriculture	1.0%
Management of Companies and...	0.5%
Utilities	0.3%

Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

Total Business Establishments, 5-Year Growth, 2016-2012

City	Growth
Bend, OR	17.2%
Provo, UT	16.7%
Castle Rock, CO	14.8%
Bozeman, MT	12.5%
Logan, UT	10.3%
Fort Collins, CO	9.7%
Boise City, ID	9.0%
Coeur d'Alene, ID	7.5%
Boulder, CO	7.4%
Missoula, MT	6.0%
Spokane, WA	5.9%
Twin Falls, ID	5.4%
Flagstaff, AZ	4.3%
Grand Junction, CO	-3.2%

U.S. Average: 4.4%
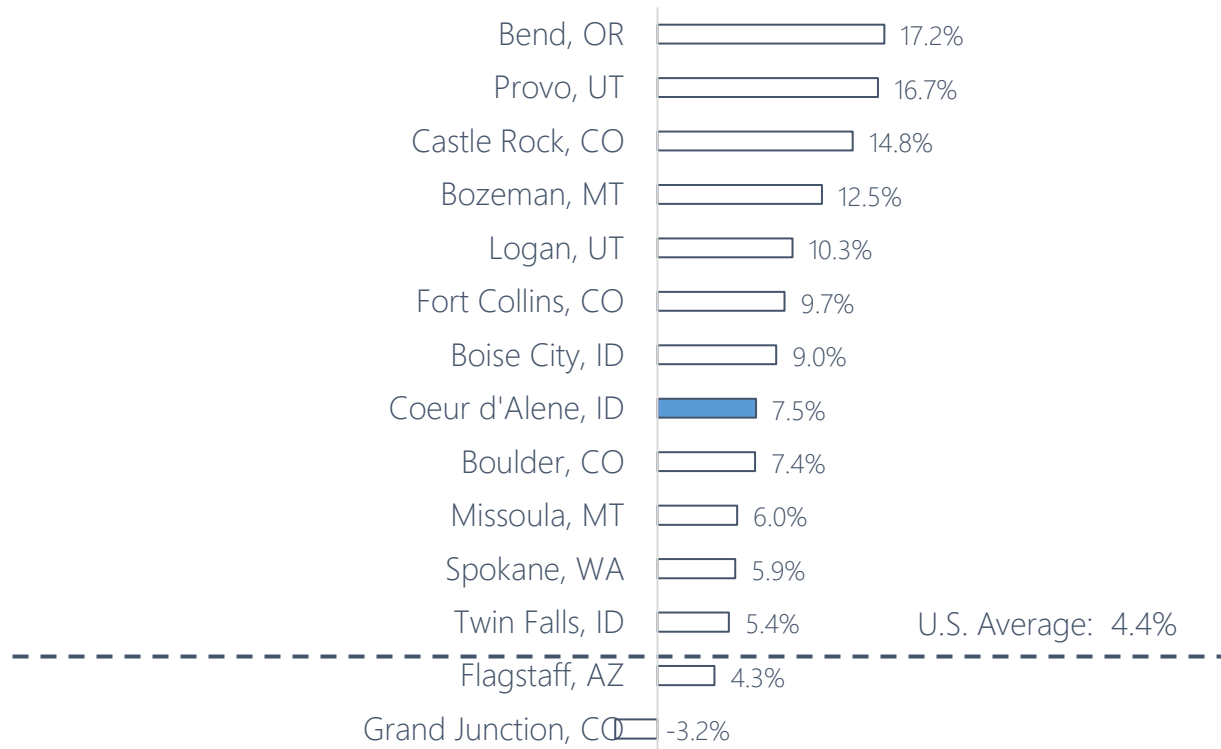
Source: U.S. County Business Patterns 2012- 2016

**Agriculture
(% of Businesses), 2016**

City	%
Missoula, MT	1.0%
Coeur d'Alene, ID	1.0%
Twin Falls, ID	0.9%
Bend, OR	0.6%
Bozeman, MT	0.6%
Logan, UT	0.3%
Castle Rock, CO	0.3%
Flagstaff, AZ	0.2%
Spokane, WA	0.2%
Fort Collins, CO	0.2%
Boulder, CO	0.2%
Provo, UT	0.1%
Grand Junction,…	0.1%
Boise City, ID	0.1%

U.S. Average: 0.3%
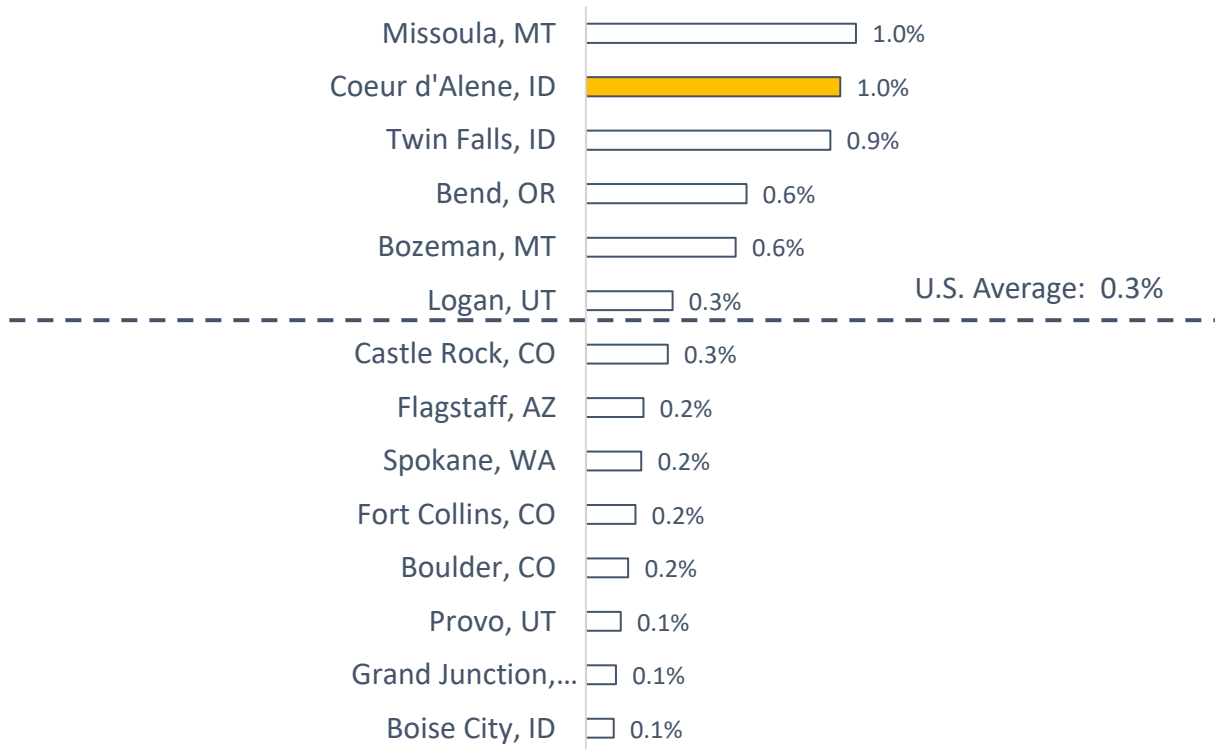
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

Utilities
(% of Businesses), 2016
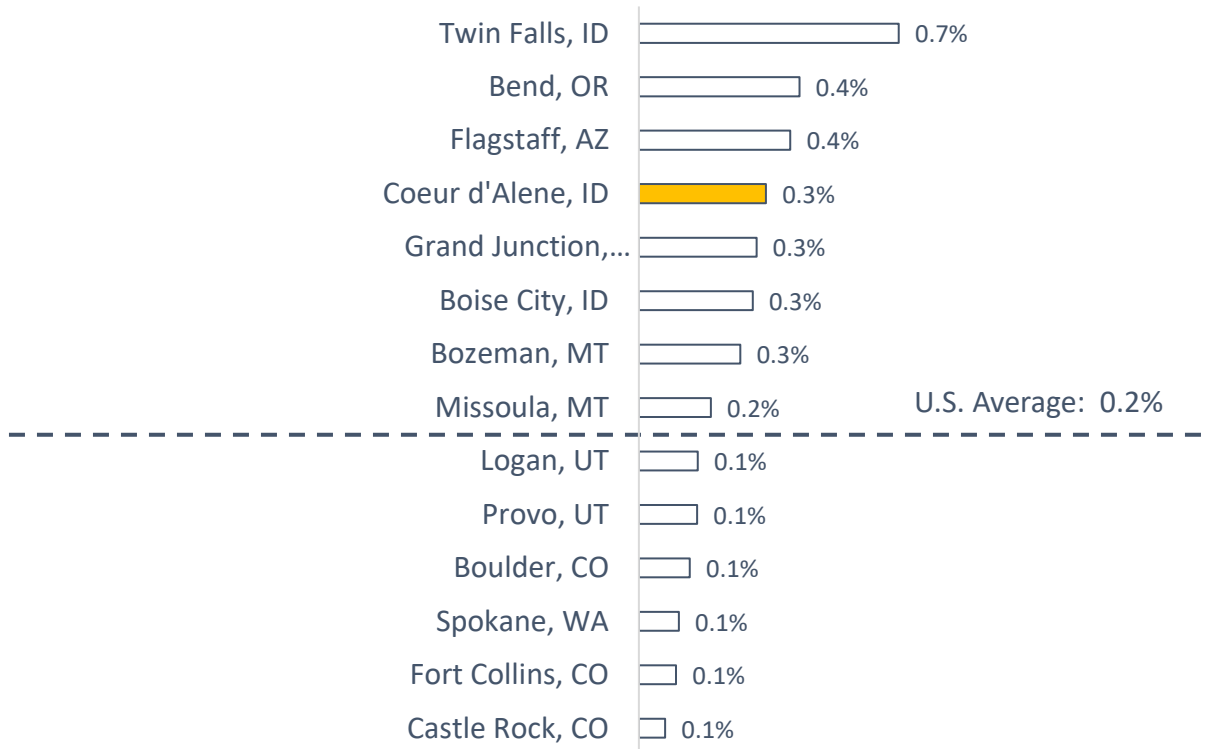
City	Percent
Twin Falls, ID	0.7%
Bend, OR	0.4%
Flagstaff, AZ	0.4%
Coeur d'Alene, ID	0.3%
Grand Junction,…	0.3%
Boise City, ID	0.3%
Bozeman, MT	0.3%
Missoula, MT	0.2%
Logan, UT	0.1%
Provo, UT	0.1%
Boulder, CO	0.1%
Spokane, WA	0.1%
Fort Collins, CO	0.1%
Castle Rock, CO	0.1%

U.S. Average: 0.2%
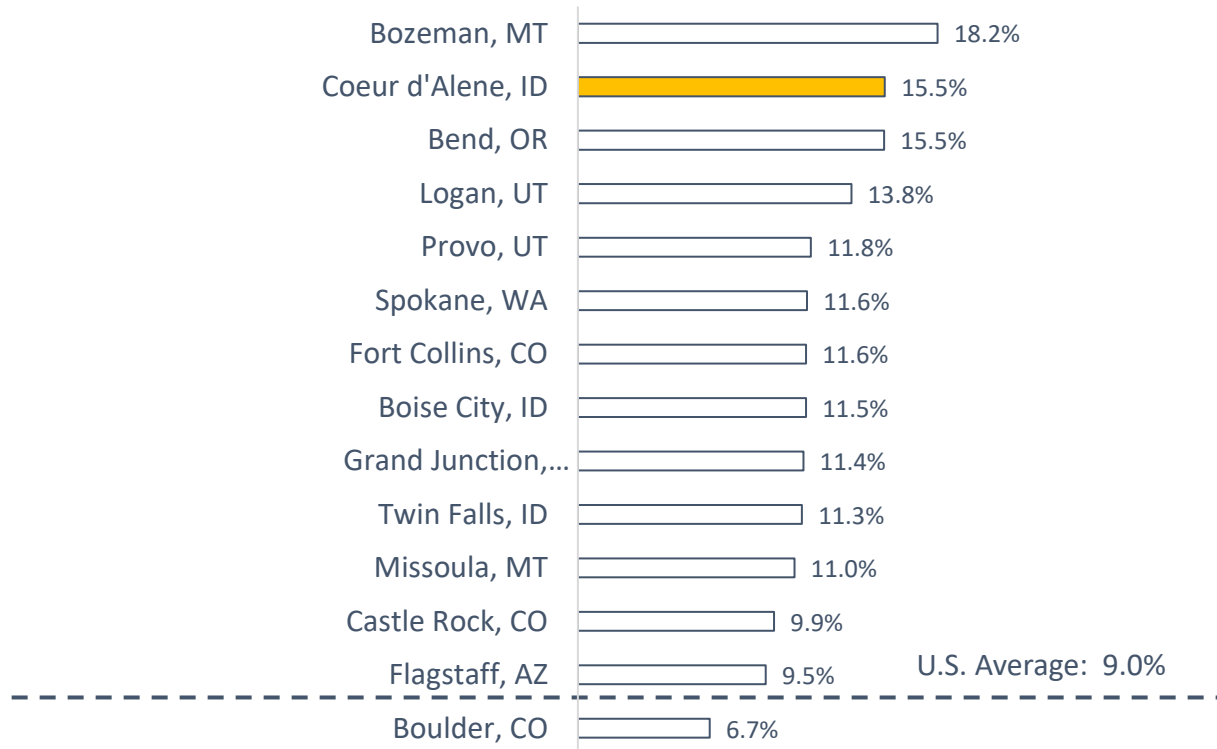
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Manufacturing
(% of Businesses), 2016**

City	%
Logan, UT	6.0%
Coeur d'Alene, ID	5.2%
Bend, OR	4.7%
Boulder, CO	4.5%
Provo, UT	4.3%
Fort Collins, CO	4.1%
Bozeman, MT	4.1%
Spokane, WA	4.0%
Twin Falls, ID	3.6%
Grand Junction,…	3.3%
Boise City, ID	3.0%
Missoula, MT	2.8%
Flagstaff, AZ	2.5%
Castle Rock, CO	1.7%

U.S. Average: 3.8%
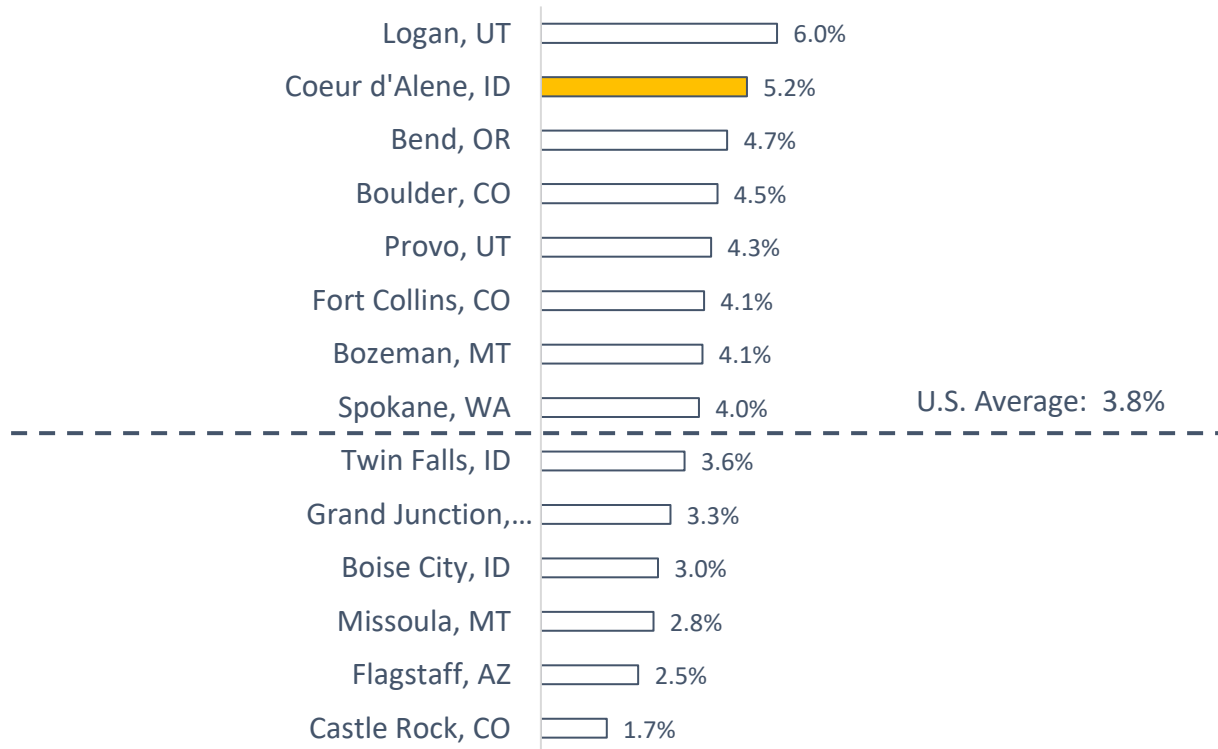
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Wholesale Trade
(% of Businesses), 2016**

City	%
Spokane, WA	5.6%
Grand Junction,...	5.5%
Twin Falls, ID	5.5%
Boise City, ID	5.2%
Logan, UT	4.2%
Boulder, CO	4.2%
Missoula, MT	4.1%
Castle Rock, CO	4.0%
Bend, OR	3.8%
Provo, UT	3.7%
Fort Collins, CO	3.6%
Coeur d'Alene, ID	3.5%
Bozeman, MT	3.2%
Flagstaff, AZ	2.8%

U.S. Average: 5.3%
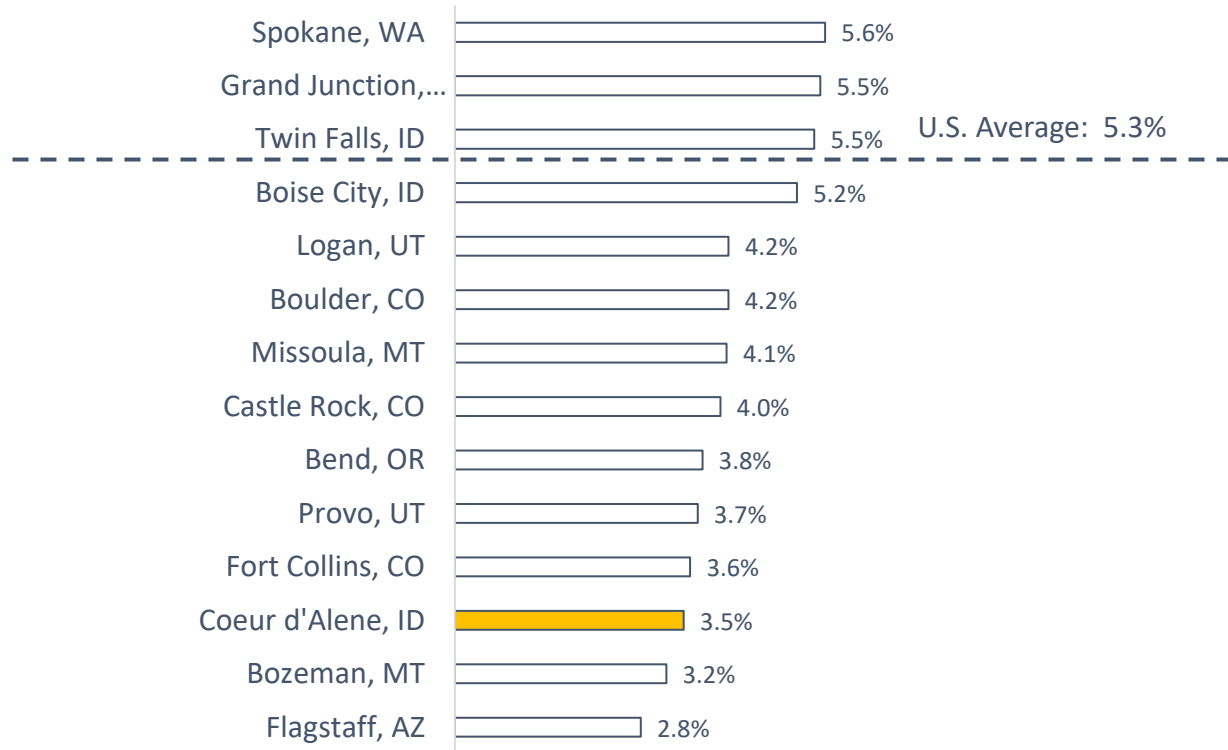
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

Retail Trade
(% of Businesses), 2016

City	%
Flagstaff, AZ	16.3%
Provo, UT	14.7%
Twin Falls, ID	14.0%
Logan, UT	13.9%
Grand Junction,…	13.3%
Missoula, MT	13.1%
Spokane, WA	12.7%
Coeur d'Alene, ID	12.5%
Bend, OR	11.8%
Fort Collins, CO	11.7%
Boise City, ID	11.4%
Bozeman, MT	10.8%
Castle Rock, CO	10.1%
Boulder, CO	9.5%

U.S. Average: 13.8%
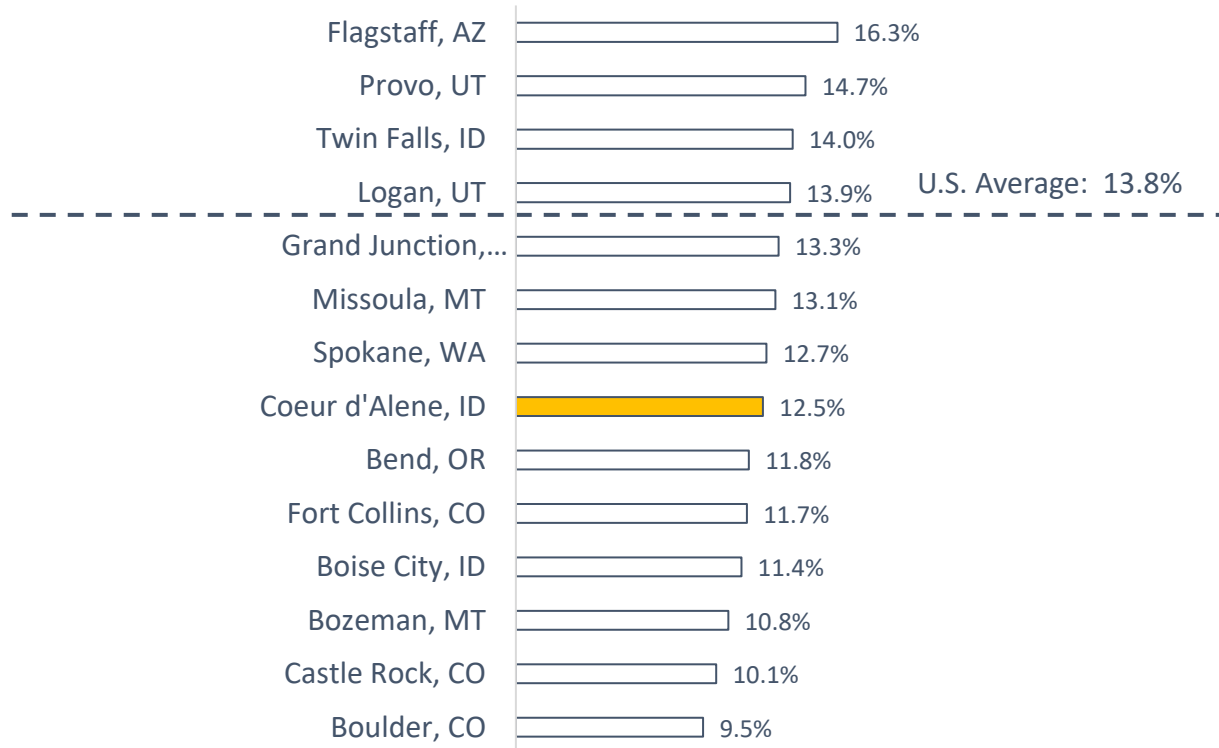
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Transportation and Warehousing
(% of Businesses), 2016**

City	%
Twin Falls, ID	5.6%
Grand Junction,…	4.1%
Missoula, MT	3.3%
Flagstaff, AZ	2.7%
Logan, UT	2.5%
Boise City, ID	2.4%
Spokane, WA	2.3%
Bozeman, MT	2.3%
Coeur d'Alene, ID	2.3%
Bend, OR	2.0%
Provo, UT	1.9%
Fort Collins, CO	1.8%
Castle Rock, CO	1.1%
Boulder, CO	0.7%

U.S. Average: 3.0%
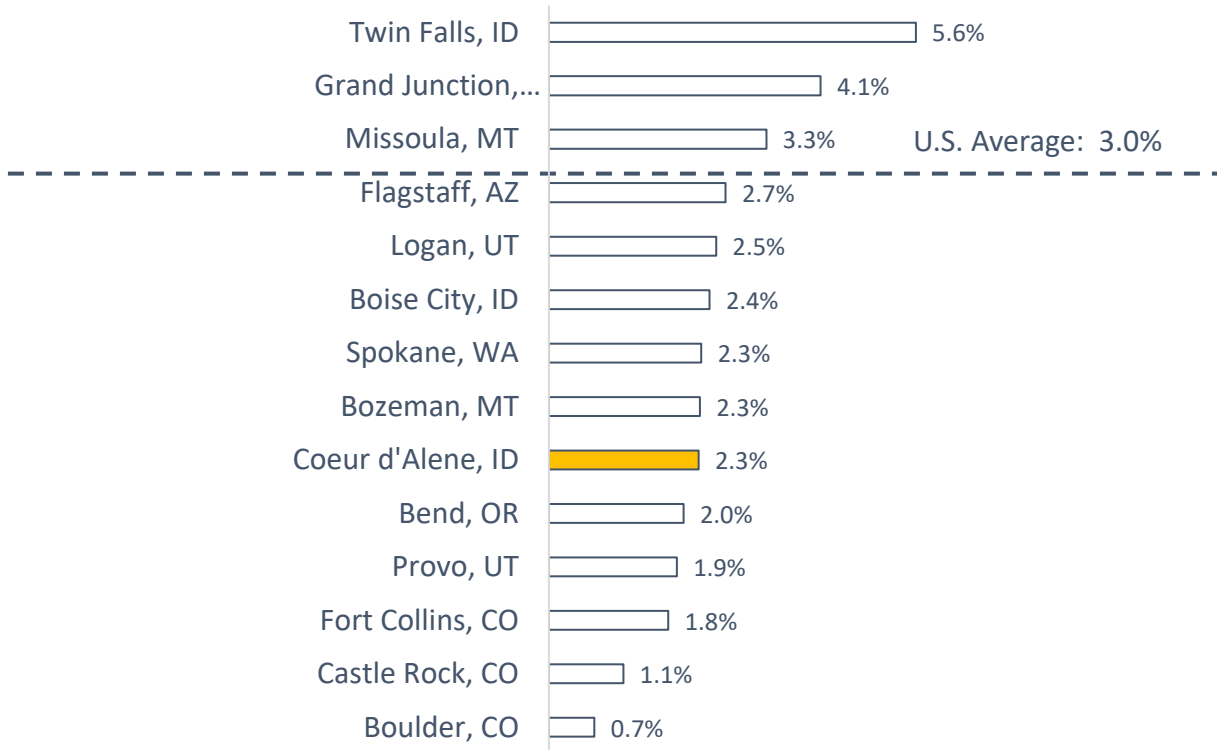
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Information
(% of Businesses), 2016**

City	%
Provo, UT	2.7%
Castle Rock, CO	2.6%
Boulder, CO	2.5%
Bend, OR	2.2%
Bozeman, MT	1.8%
Boise City, ID	1.8%
Fort Collins, CO	1.7%
Spokane, WA	1.7%
Missoula, MT	1.6%
Logan, UT	1.6%
Coeur d'Alene, ID	1.5%
Flagstaff, AZ	1.5%
Grand Junction,…	1.3%
Twin Falls, ID	0.9%

U.S. Average: 1.9%
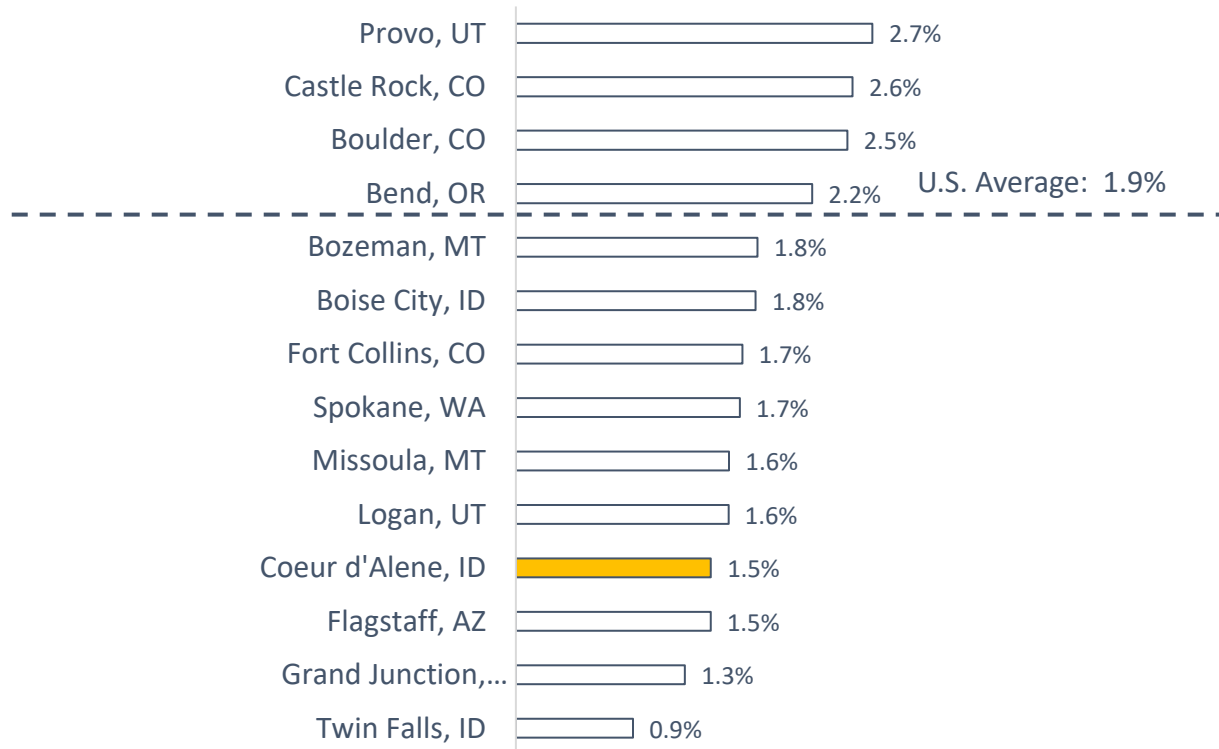
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Finance and Insurance
(% of Businesses), 2016**

City	%
Castle Rock, CO	7.8%
Boise City, ID	7.4%
Spokane, WA	7.0%
Logan, UT	6.1%
Provo, UT	6.1%
Coeur d'Alene, ID	5.9%
Grand Junction,…	5.8%
Twin Falls, ID	5.7%
Fort Collins, CO	5.6%
Missoula, MT	5.5%
Boulder, CO	5.4%
Bend, OR	4.6%
Flagstaff, AZ	4.4%
Bozeman, MT	4.2%

U.S. Average: 6.1%
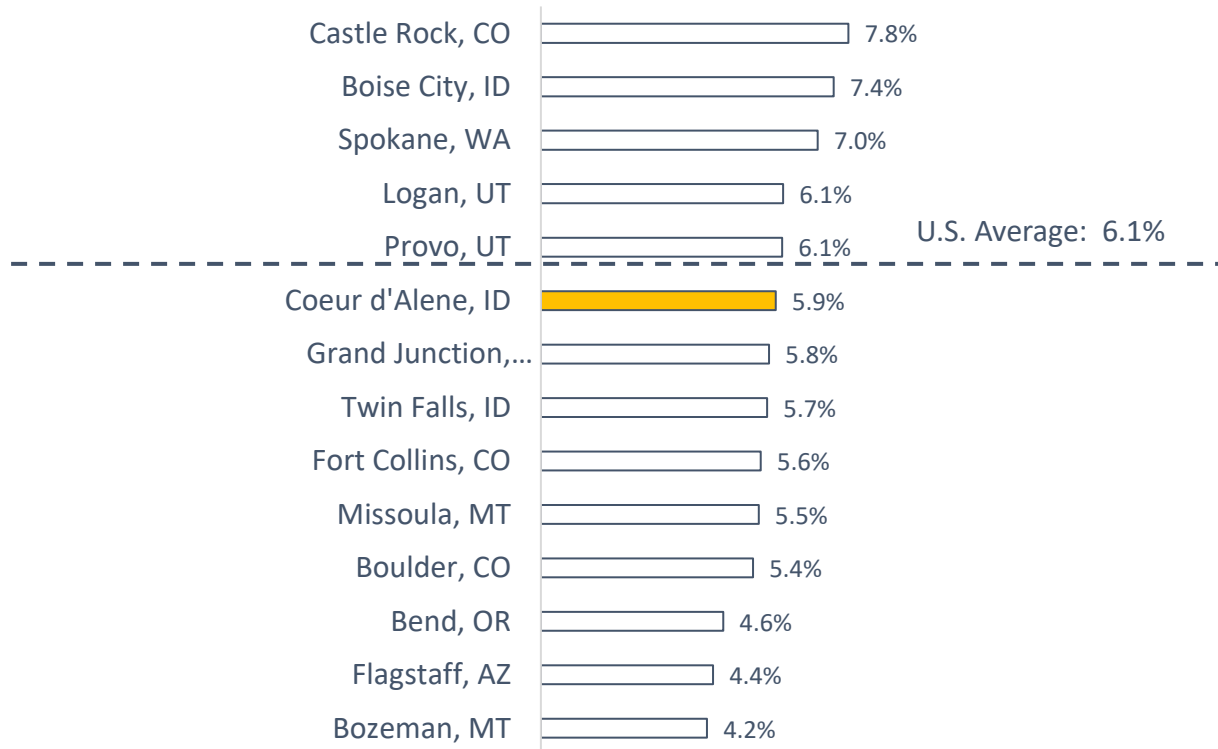
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Real Estate and Rental and Leasing
(% of Businesses), 2016**

City	%
Castle Rock, CO	7.8%
Bozeman, MT	7.6%
Bend, OR	6.9%
Fort Collins, CO	6.7%
Boise City, ID	6.6%
Grand Junction,…	6.6%
Provo, UT	6.6%
Logan, UT	6.5%
Flagstaff, AZ	6.0%
Boulder, CO	6.0%
Coeur d'Alene, ID	5.7%
Missoula, MT	5.4%
Twin Falls, ID	5.3%
Spokane, WA	5.1%

U.S. Average: 5.0%
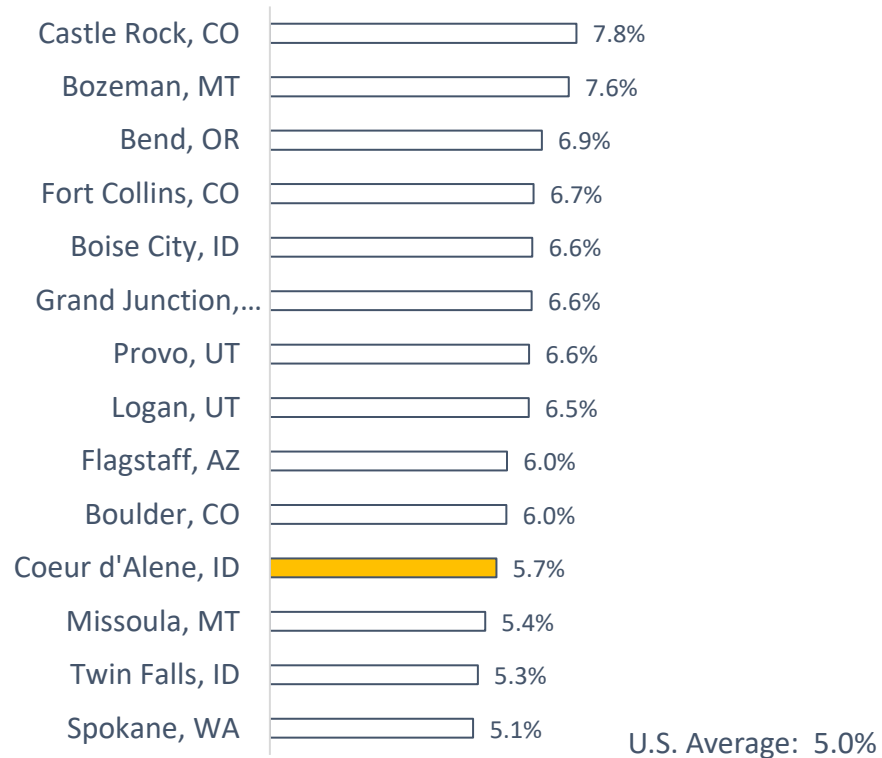
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Professional Services
(% of Businesses), 2016**

City	%
Boulder, CO	23.6%
Castle Rock, CO	20.0%
Provo, UT	15.7%
Fort Collins, CO	15.2%
Bozeman, MT	13.7%
Boise City, ID	13.5%
Logan, UT	12.7%
Missoula, MT	12.6%
Bend, OR	12.1%
Grand Junction,…	11.3%
Coeur d'Alene, ID	10.6%
Spokane, WA	10.4%
Flagstaff, AZ	9.6%
Twin Falls, ID	9.1%

U.S. Average: 11.6%

Source: U.S. County Business Patterns 2016

51
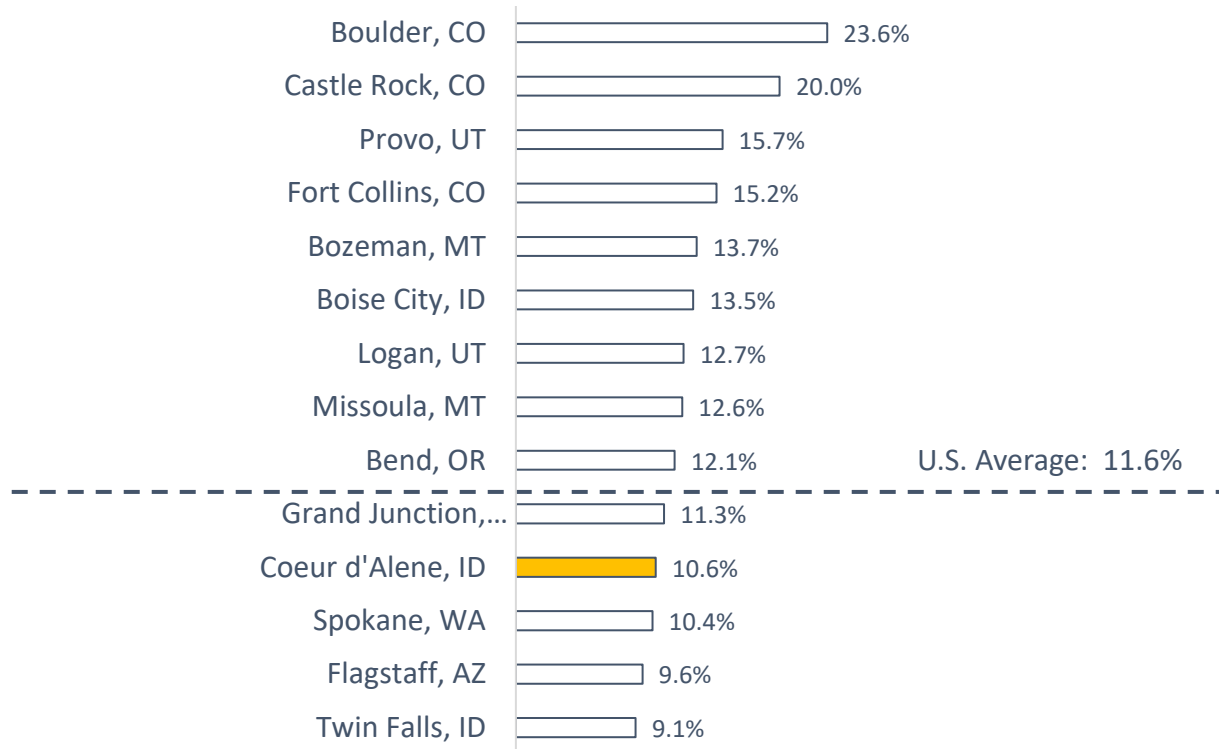
BUSINESS ESTABLISHMENTS

Management of Companies and Enterprises
(% of Businesses), 2016

City	%
Boise City, ID	0.9%
Spokane, WA	0.7%
Castle Rock, CO	0.6%
Twin Falls, ID	0.5%
Coeur d'Alene, ID	0.5%
Provo, UT	0.5%
Missoula, MT	0.5%
Boulder, CO	0.5%
Fort Collins, CO	0.4%
Bend, OR	0.4%
Grand Junction,...	0.4%
Logan, UT	0.4%
Flagstaff, AZ	0.3%
Bozeman, MT	0.3%

U.S. Average: 0.7%

Source: U.S. County Business Patterns 2016

52
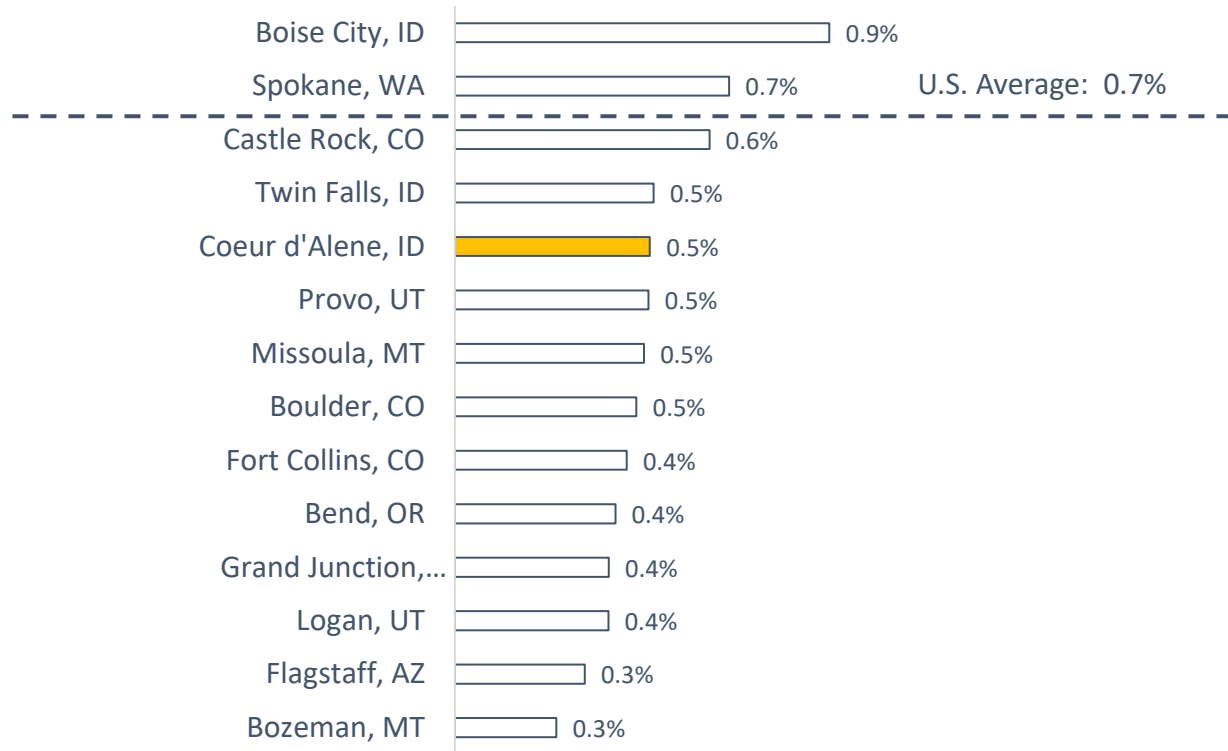
BUSINESS ESTABLISHMENTS

**Administrative and Support
(% of Businesses), 2016**

City	%
Boise City, ID	6.0%
Bend, OR	5.9%
Bozeman, MT	5.6%
Castle Rock, CO	5.5%
Fort Collins, CO	5.5%
Missoula, MT	5.5%
Spokane, WA	5.4%
Provo, UT	5.4%
Coeur d'Alene, ID	5.2%
Logan, UT	5.1%
Grand Junction,…	5.0%
Boulder, CO	4.9%
Twin Falls, ID	4.5%
Flagstaff, AZ	4.1%

U.S. Average: 5.3%
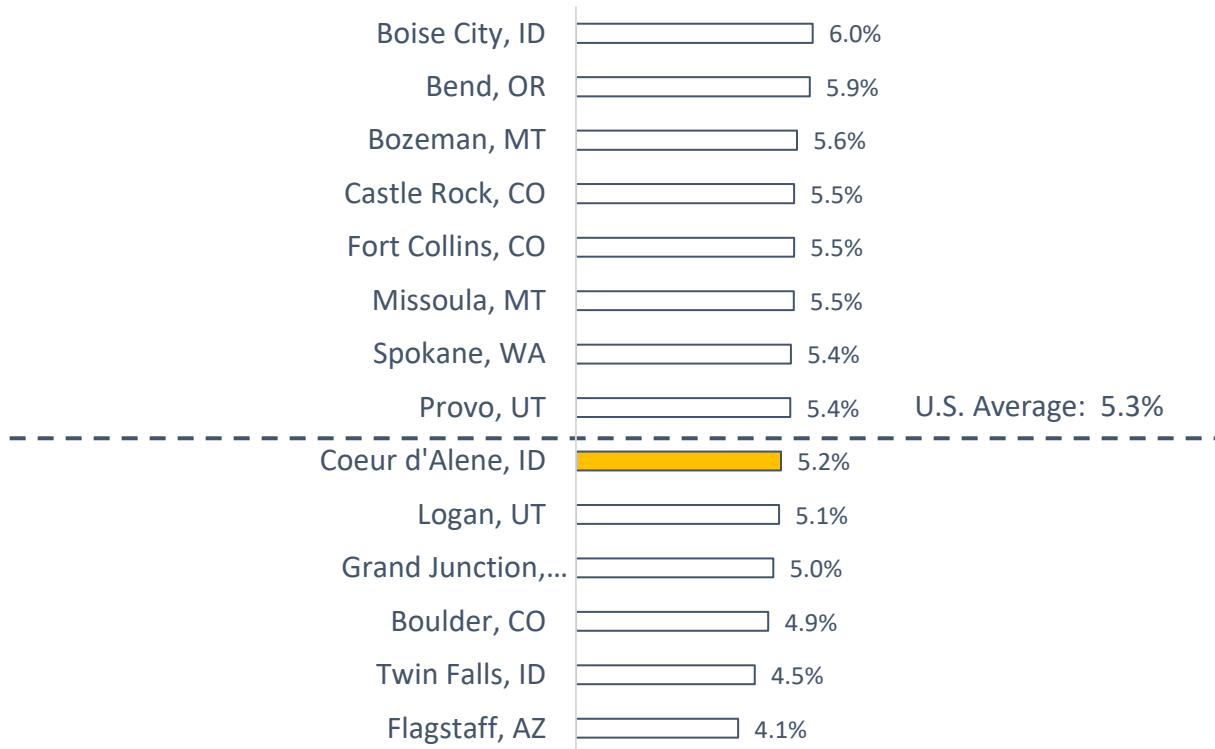
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Educational Services
(% of Businesses), 2016**

City	Percentage
Boulder, CO	2.3%
Castle Rock, CO	2.2%
Provo, UT	2.1%
Missoula, MT	1.7%
Fort Collins, CO	1.6%
Boise City, ID	1.3%
Coeur d'Alene, ID	1.3%
Bozeman, MT	1.3%
Spokane, WA	1.2%
Bend, OR	1.2%
Logan, UT	1.1%
Flagstaff, AZ	1.0%
Grand Junction,…	0.9%
Twin Falls, ID	0.5%

U.S. Average: 1.3%

Source: U.S. County Business Patterns 2016

54
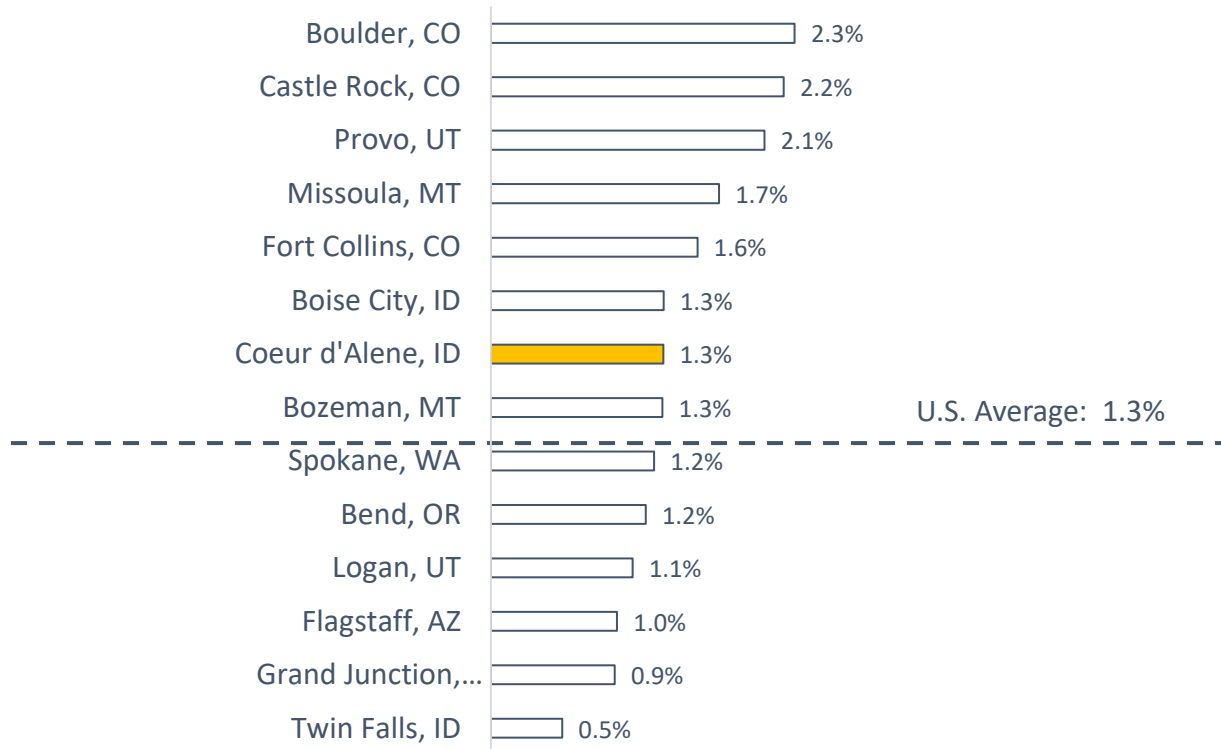
BUSINESS ESTABLISHMENTS

**Health and Social Assistance
(% of Businesses), 2016**

City	%
Fort Collins, CO	14.5%
Spokane, WA	12.4%
Missoula, MT	11.7%
Boulder, CO	11.6%
Logan, UT	11.3%
Boise City, ID	11.3%
Coeur d'Alene, ID	10.8%
Fort Collins, CO	10.6%
Flagstaff, AZ	10.6%
Provo, UT	10.6%
Bend, OR	9.9%
Castle Rock, CO	9.9%
Grand Junction,…	9.8%
Bozeman, MT	7.8%

U.S. Average: 11.5%
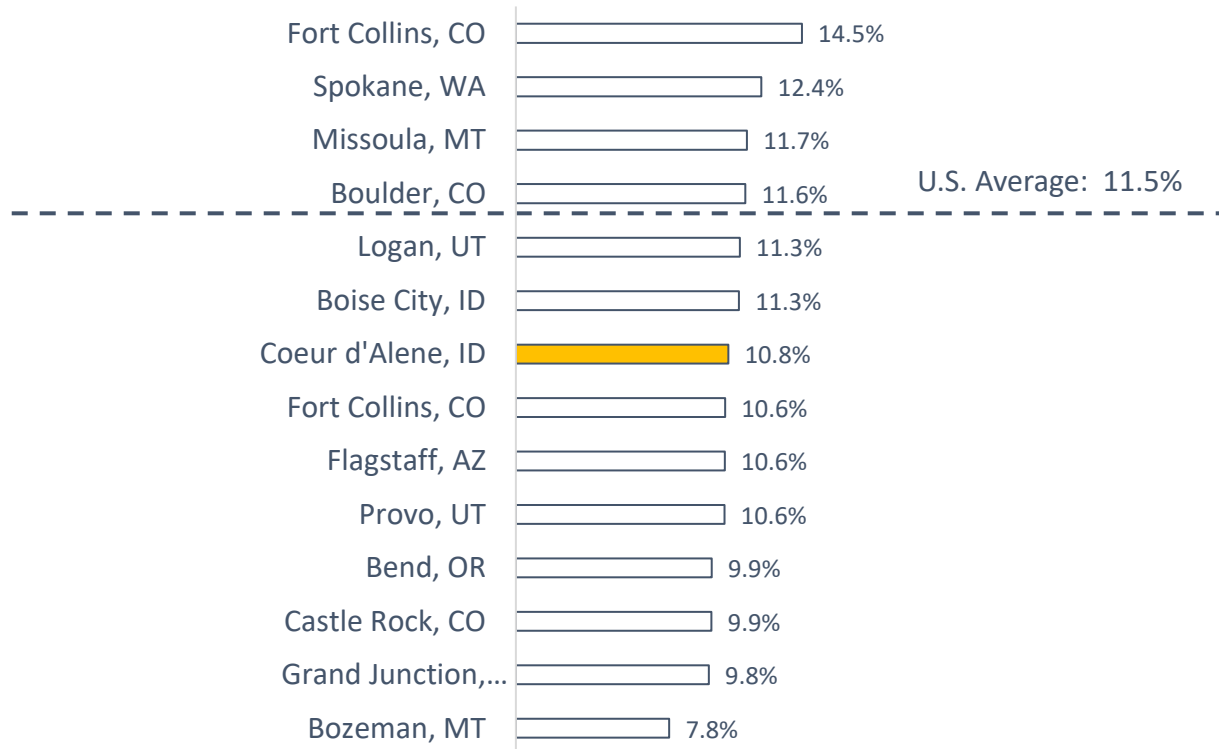
Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Arts, Entertainment, and Recreation
(% of Businesses), 2016**

City	%
Bozeman, MT	2.8%
Flagstaff, AZ	2.6%
Missoula, MT	2.6%
Boulder, CO	2.2%
Logan, UT	2.0%
Coeur d'Alene, ID	2.0%
Fort Collins, CO	1.9%
Bend, OR	1.8%
Provo, UT	1.6%
Twin Falls, ID	1.6%
Grand Junction,…	1.5%
Castle Rock, CO	1.5%
Boise City, ID	1.5%
Spokane, WA	1.4%
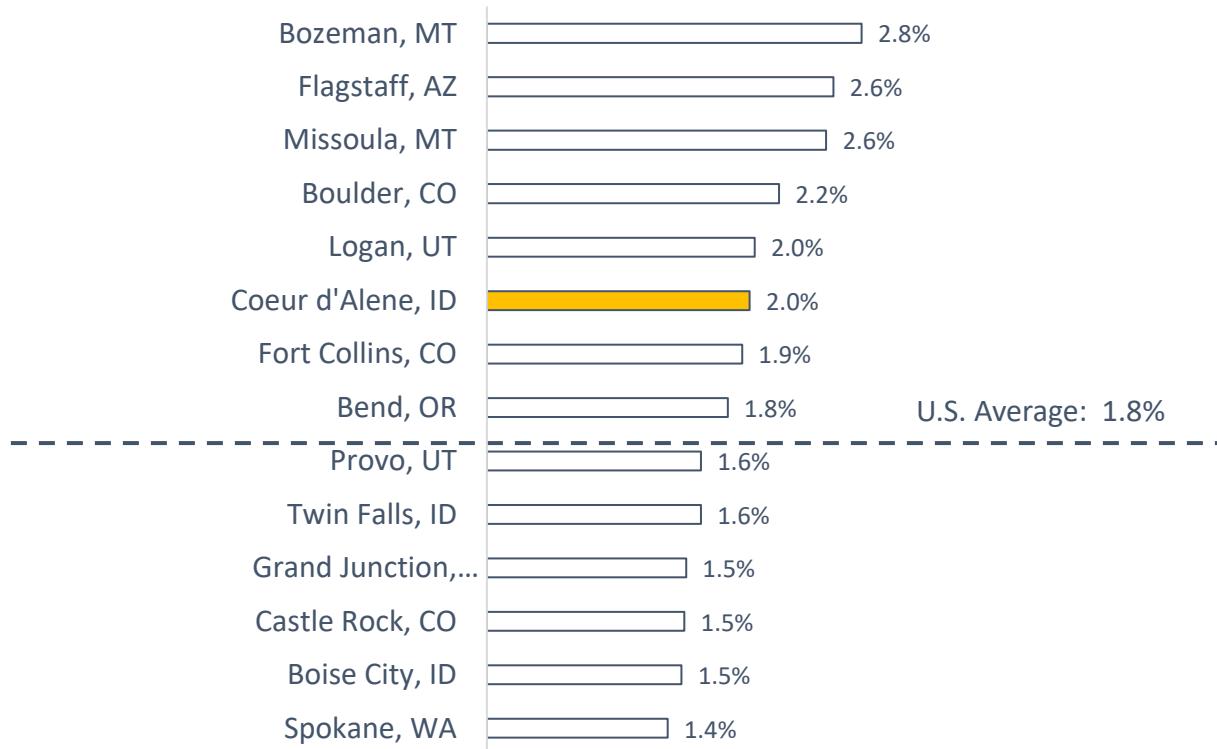
U.S. Average: 1.8%

Source: U.S. County Business Patterns 2016

BUSINESS ESTABLISHMENTS

**Accommodation and Food Services
(% of Businesses), 2016**
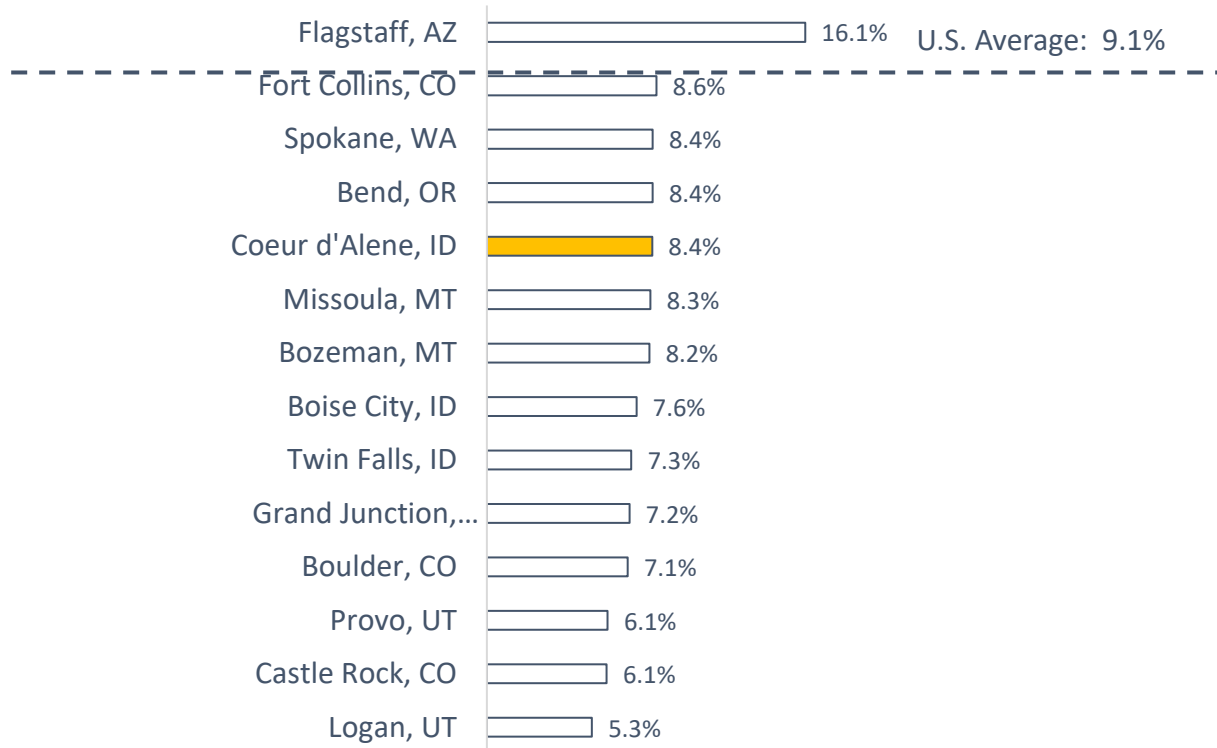
City	%
Flagstaff, AZ	16.1%
Fort Collins, CO	8.6%
Spokane, WA	8.4%
Bend, OR	8.4%
Coeur d'Alene, ID	8.4%
Missoula, MT	8.3%
Bozeman, MT	8.2%
Boise City, ID	7.6%
Twin Falls, ID	7.3%
Grand Junction,…	7.2%
Boulder, CO	7.1%
Provo, UT	6.1%
Castle Rock, CO	6.1%
Logan, UT	5.3%

U.S. Average: 9.1%
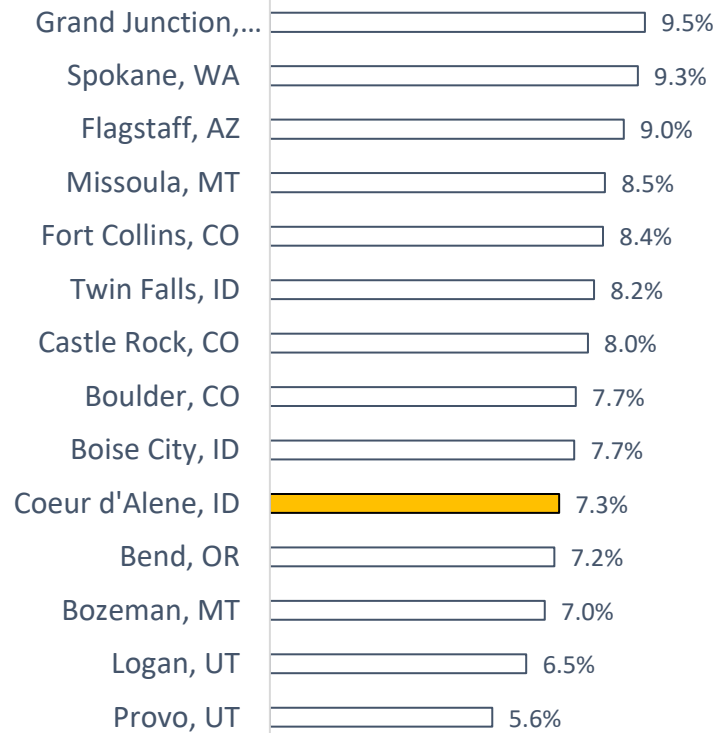
Source: U.S. County Business Patterns 2016

RESIDENTS BY OCCUPATIONS

TAKEAWAYS

- **Service Sector**
  Five in ten Coeur d'Alene workers (47.9%) have skills associated with the service sector – a share that ranks second among the benchmark cities and above the U.S. average (41.5%). Coeur d'Alene's service sector has increased 6% since 2013, two times the national average.

- **Working Sector**
  Approximately 4,500 Coeur d'Alene residents make up the city's working sector (20%) – skills associated production/ manufacturing, transportation, and maintenance. This is the fourth highest share among the benchmark cities. There's be a 1% decrease in the working sector since 2013.

- **Creative Sector**
  Coeur d'Alene's creative class (32.3%) – workers with skills in technology, arts/ culture, professional services, and education – ranks second to land among the benchmark cities and is well below the U.S. average (37.4%). That said Coeur d'Alene's creative class has grown more than 20% since 2013, ranking fourth and on par with Bend, Castle Rock, and Bozeman.

OCCUPATIONS

Residents by Occupational Sector, 2017

Working Sector
- Building and grounds cleaning and maintenance
- Construction and extraction
- Installation and repair
- Production
- Transportation and moving

Creative Sector
- Management
- Business and financial operations
- Computer and mathematical
- Architecture and engineering
- Life, physical and social science
- Education
- Legal
- Arts, design, entertainments and media
- Education and training

Service Sector
- Healthcare support
- Protective services
- Food preparation
- Personal care
- Sales
- Office and administrative support

19.9%

32.2%

47.9%

■ Working Sector   ■ Creative Sector   ■ Service Sector

Source: U.S. Census American Community Survey 2017

OCCUPATIONS

Knowledge Sector, 2017

Knowledge Sector
- Management
- Business and financial operations
- Computer and mathematical
- Architecture and engineering
- Life, physical and social science
- Education
- Legal
- Arts, design, entertainments and media
- Education and training

City	Knowledge Sector
Boulder, CO	56.8%
Castle Rock, CO	48.3%
Fort Collins, CO	45.7%
Boise City, ID	44.0%
Bend, OR	43.0%
Bozeman, MT	42.1%
Provo, UT	41.8%
Missoula, MT	41.4%
Flagstaff, AZ	38.1%
Grand Junction, CO	36.2%
Spokane, WA	35.2%
Logan, UT	34.7%
Coeur d'Alene, ID	32.3%
Twin Falls, ID	27.3%

U.S. Average: 37.4%

Source: U.S. Census American Community Survey 2017

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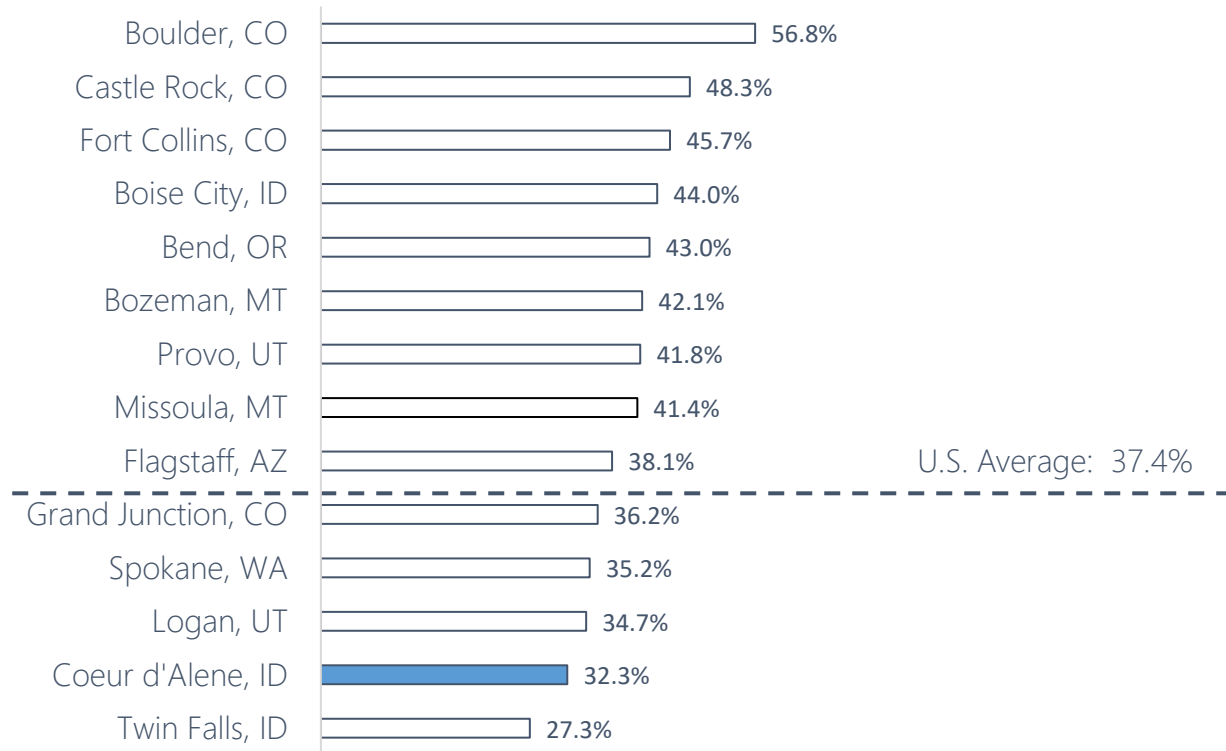
OCCUPATIONS

Service Sector, 2017

Service Sector
- Healthcare support
- Protective services
- Food preparation
- Personal care
- Sales
- Office and administrative support

City	Percentage
Flagstaff, AZ	48.6%
Coeur d'Alene, ID	47.9%
Spokane, WA	45.6%
Twin Falls, ID	45.3%
Provo, UT	44.4%
Missoula, MT	44.0%
Grand Junction, CO	43.8%
Logan, UT	42.4%
Bend, OR	42.2%
Boise City, ID	41.5%
Fort Collins, CO	41.0%
Bozeman, MT	40.5%
Castle Rock, CO	39.4%
Boulder, CO	35.9%

U.S. Average: 41.5%
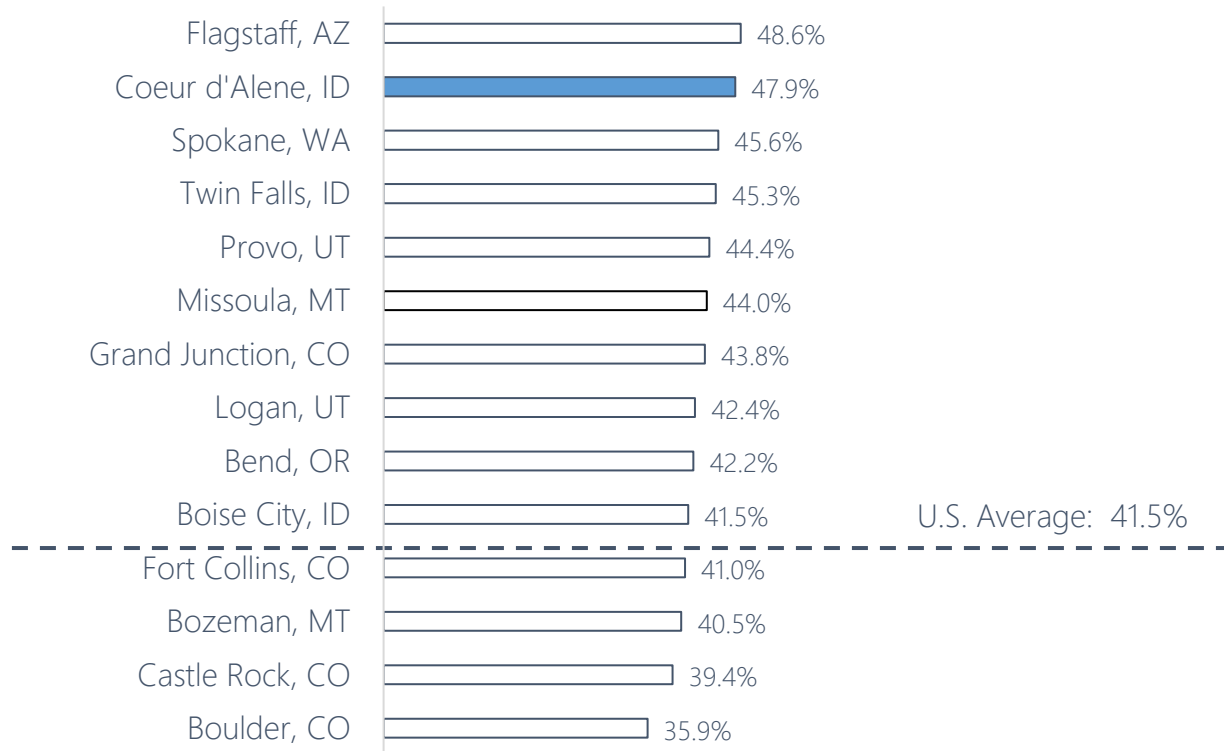
Source: U.S. Census American Community Survey 2017

OCCUPATIONS

Working Sector, 2017

Working Sector
- Building and grounds cleaning and maintenance
- Construction and extraction
- Installation and repair
- Production
- Transportation and moving

City	%
Twin Falls, ID	27.4%
Logan, UT	22.9%
Grand Junction, CO	20.0%
Coeur d'Alene, ID	19.9%
Spokane, WA	19.2%
Bozeman, MT	17.4%
Bend, OR	14.8%
Missoula, MT	14.6%
Boise City, ID	14.5%
Provo, UT	13.8%
Fort Collins, CO	13.3%
Flagstaff, AZ	13.2%
Castle Rock, CO	12.3%
Boulder, CO	7.2%

U.S. Average: 21.5%
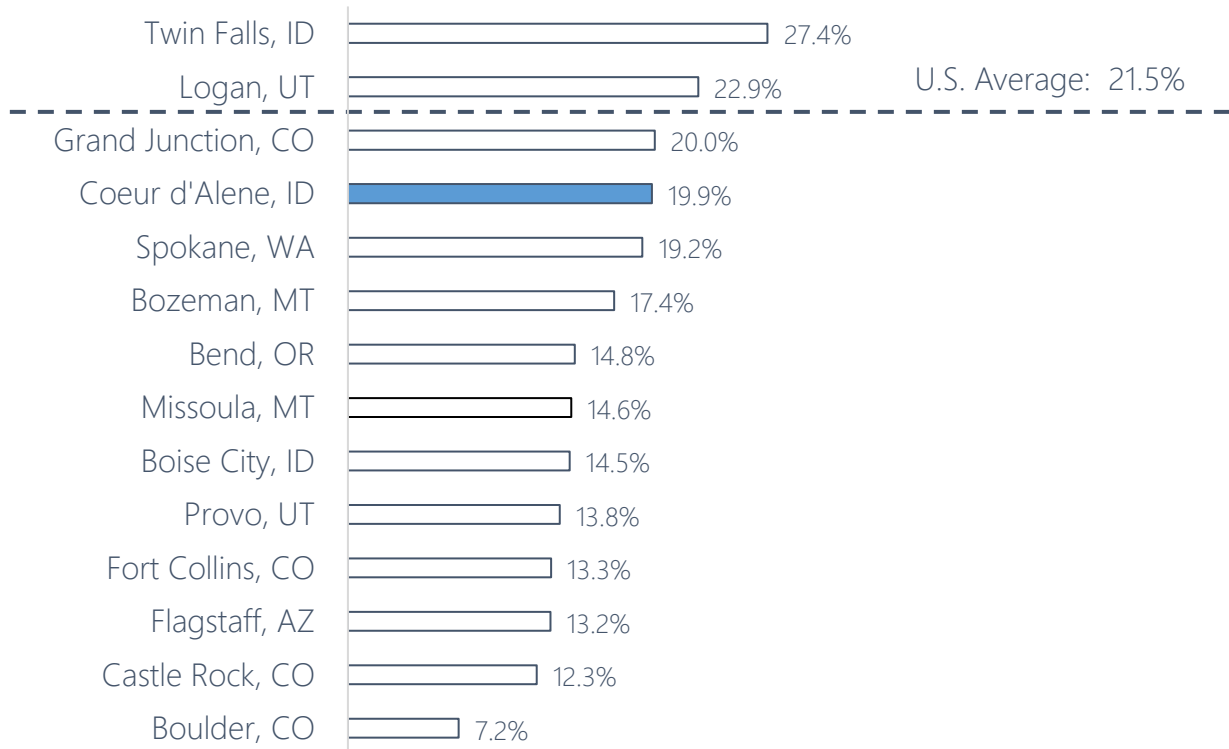
Source: U.S. Census American Community Survey 2017

OCCUPATIONS

Residents by Occupation, 2017
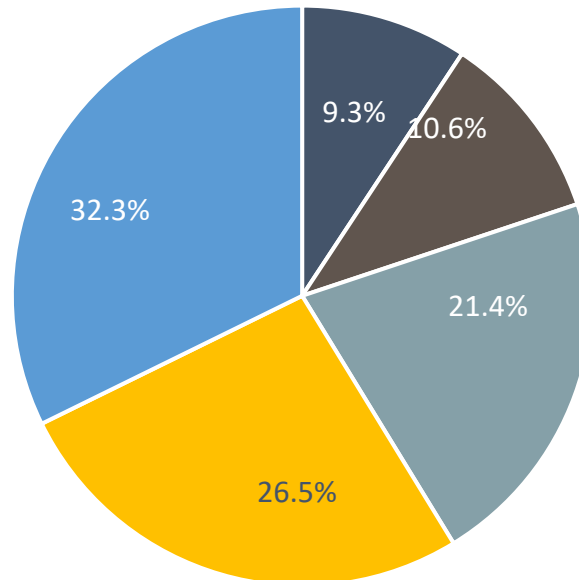
- ■ Natural Resources, Construction, and Maintenance
- ■ Production, Transportation, and Material Moving
- ■ Service
- ■ Sales and Office
- ■ Management, Business, Science, and Arts

Source: U.S. Census American Community Survey
2017

OCCUPATIONS

**Management, Business, Science and Arts
(% of Residents), 2017**

City	%
Boulder, CO	56.8%
Castle Rock, CO	48.3%
Fort Collins, CO	45.7%
Boise City, ID	44.0%
Bend, OR	43.0%
Bozeman, MT	42.1%
Provo, UT	41.8%
Missoula, MT	41.4%
Flagstaff, AZ	38.1%
Grand Junction,…	36.2%
Spokane, WA	35.2%
Logan, UT	34.7%
Coeur d'Alene, ID	32.3%
Twin Falls, ID	27.3%

U.S. Average: 37.4%
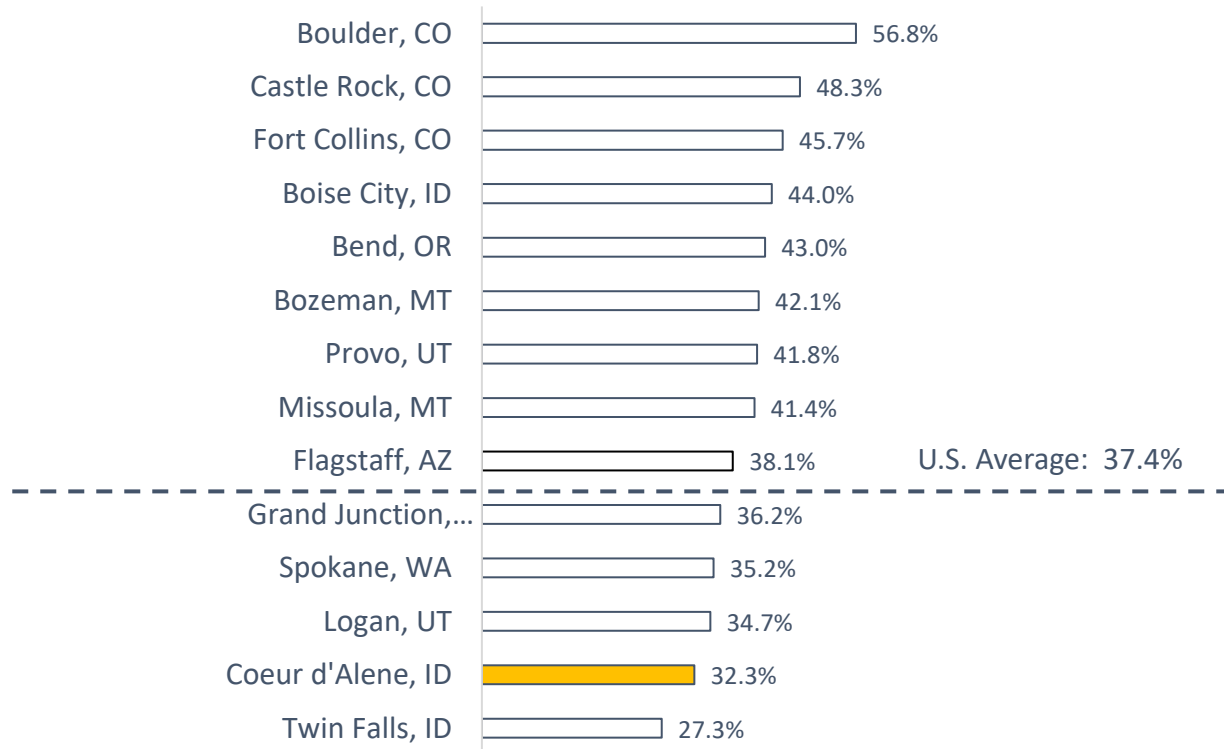
Source: U.S. Census American Community Survey 2017

OCCUPATIONS

**Service
(% of Residents), 2017**

City	Percentage
Flagstaff, AZ	23.7%
Missoula, MT	21.7%
Coeur d'Alene, ID	21.4%
Spokane, WA	20.8%
Twin Falls, ID	19.9%
Bozeman, MT	19.0%
Bend, OR	19.0%
Grand Junction,…	18.7%
Fort Collins, CO	18.4%
Provo, UT	18.0%
Logan, UT	17.6%
Boise City, ID	17.0%
Boulder, CO	16.6%
Castle Rock, CO	14.1%

U.S. Average: 18.0%
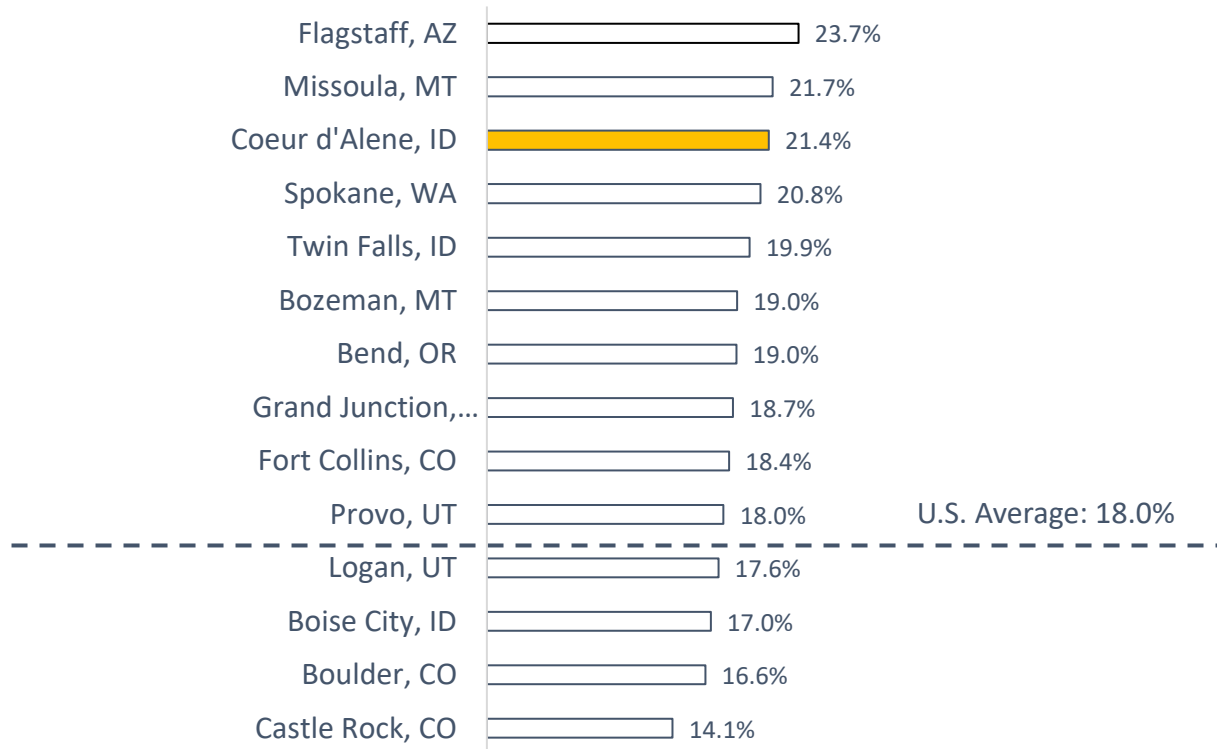
Source: U.S. Census American Community Survey 2017

OCCUPATIONS

Sales and Office
(% of Residents), 2017

City	%
Coeur d'Alene, ID	26.5%
Provo, UT	26.4%
Twin Falls, ID	25.3%
Castle Rock, CO	25.3%
Grand Junction,...	25.1%
Flagstaff, AZ	25.0%
Logan, UT	24.8%
Spokane, WA	24.8%
Boise City, ID	24.5%
Bend, OR	23.2%
Fort Collins, CO	22.6%
Missoula, MT	22.3%
Bozeman, MT	21.6%
Boulder, CO	19.4%

U.S. Average: 23.5%
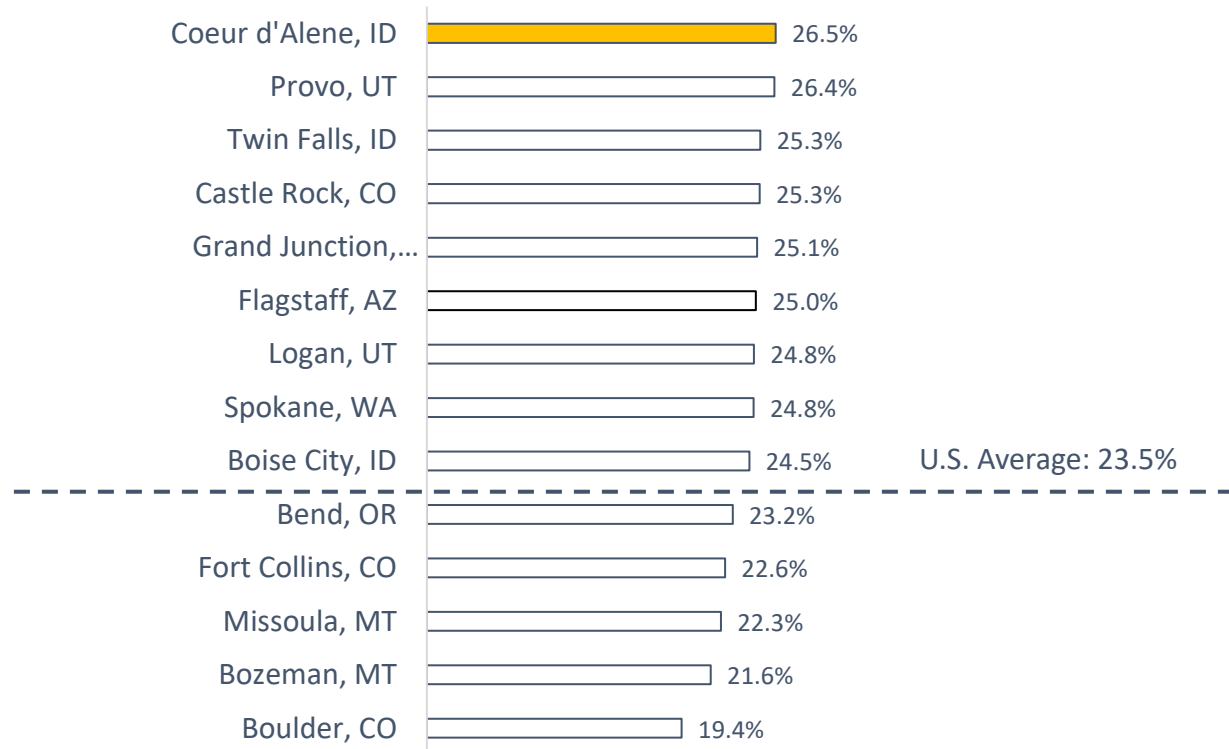
Source: U.S. Census American Community Survey 2017

OCCUPATIONS

**Natural Resources, Construction and Maintenance
(% of Residents), 2017**

City	%
Twin Falls, ID	10.9%
Grand Junction,…	9.7%
Bozeman, MT	9.7%
Coeur d'Alene, ID	9.3%
Logan, UT	7.3%
Bend, OR	7.2%
Spokane, WA	7.1%
Missoula, MT	6.9%
Boise City, ID	6.3%
Fort Collins, CO	6.1%
Castle Rock, CO	6.0%
Provo, UT	5.7%
Flagstaff, AZ	5.7%
Boulder, CO	2.8%

U.S. Average: 8.9%
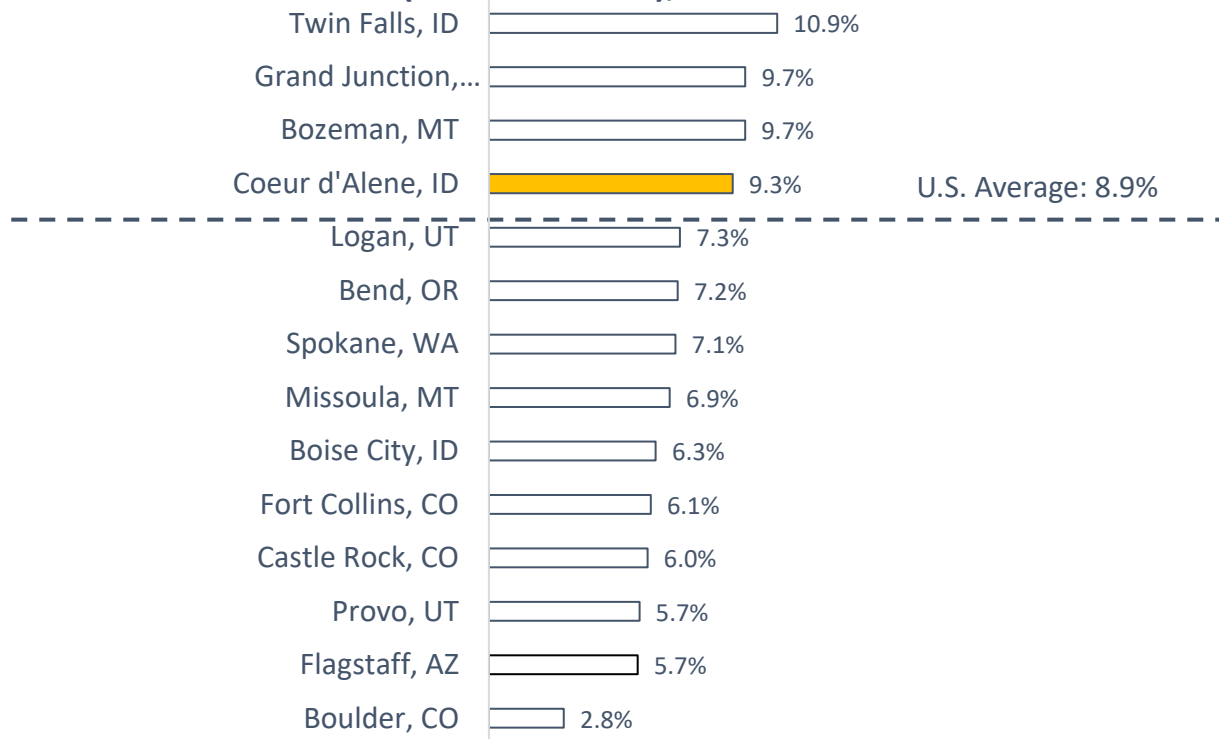
Source: U.S. Census American Community Survey 2017

OCCUPATIONS

Production, Transportation and Moving
(% of Residents), 2017

City	%
Twin Falls, ID	16.5%
Logan, UT	15.6%
Spokane, WA	12.2%
Coeur d'Alene, ID	10.6%
Grand Junction,…	10.3%
Boise City, ID	8.2%
Provo, UT	8.1%
Missoula, MT	7.7%
Bozeman, MT	7.7%
Bend, OR	7.7%
Flagstaff, AZ	7.6%
Fort Collins, CO	7.1%
Castle Rock, CO	6.3%
Boulder, CO	4.4%

U.S. Average: 11.3%

Source: U.S. Census American Community Survey 2017

70
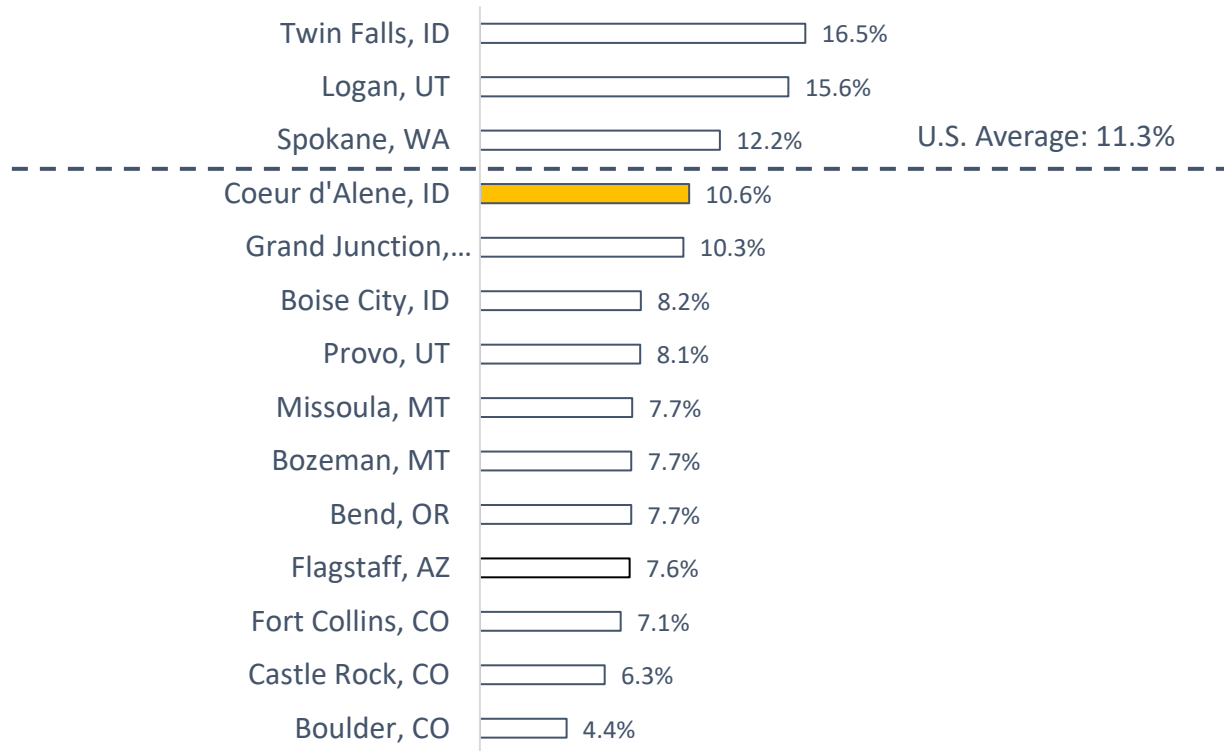
RESIDENTS BY INDUSTRY

TAKEAWAYS

- **Med and Eds.**
  Coeur d'Alene's health and educational sector employs 20% of the city's residents – an estimated 4,250 workers and a 5% increase from 2013.

- **Retail, Accommodation, Recreation and Hospitality.**
  Nearly one-third of all Coeur d'Alene's residents (approximately 6,400) are employed in the retail, accommodation, recreation, and hospitality sectors. This share ranks second among the benchmark communities.

- **Construction.**
  Nearly 9% of Coeur d'Alene's residents (1,900) are employed in the construction sector; this is second among the benchmark communities. Since 2013, the share construction sector has decreased 20%.

- **Manufacturing.**
  Manufacturing accounts for 7.5% of the employment among Coeur d'Alene residents (1,700) – a employment base that is up 32% since 2013 (nearly 8 times the growth of the U.S. average).

- **Professional Services.**
  Eleven percent of Coeur d'Alene's residents (2,500) are employed in the professional services sector; this is on par with Grand Junction, Bozeman, and Missoula.

INDUSTRY

Residents by Industry, 2017

Industry	Percent
Educational and Health Services	19.0%
Retail Trade	14.5%
Arts, Entertainment, Recreation,…	14.1%
Professional, Scientific, and Management	11.1%
Construction	8.6%
Manufacturing	7.5%
Finance, Insurance, and Real Estate	7.2%
Public Adminstration	4.5%
Other Services	4.0%
Transportation, Warehousing and Utilities	3.9%
Agriculture	2.3%
Wholesale Trade	2.2%
Information	1.1%
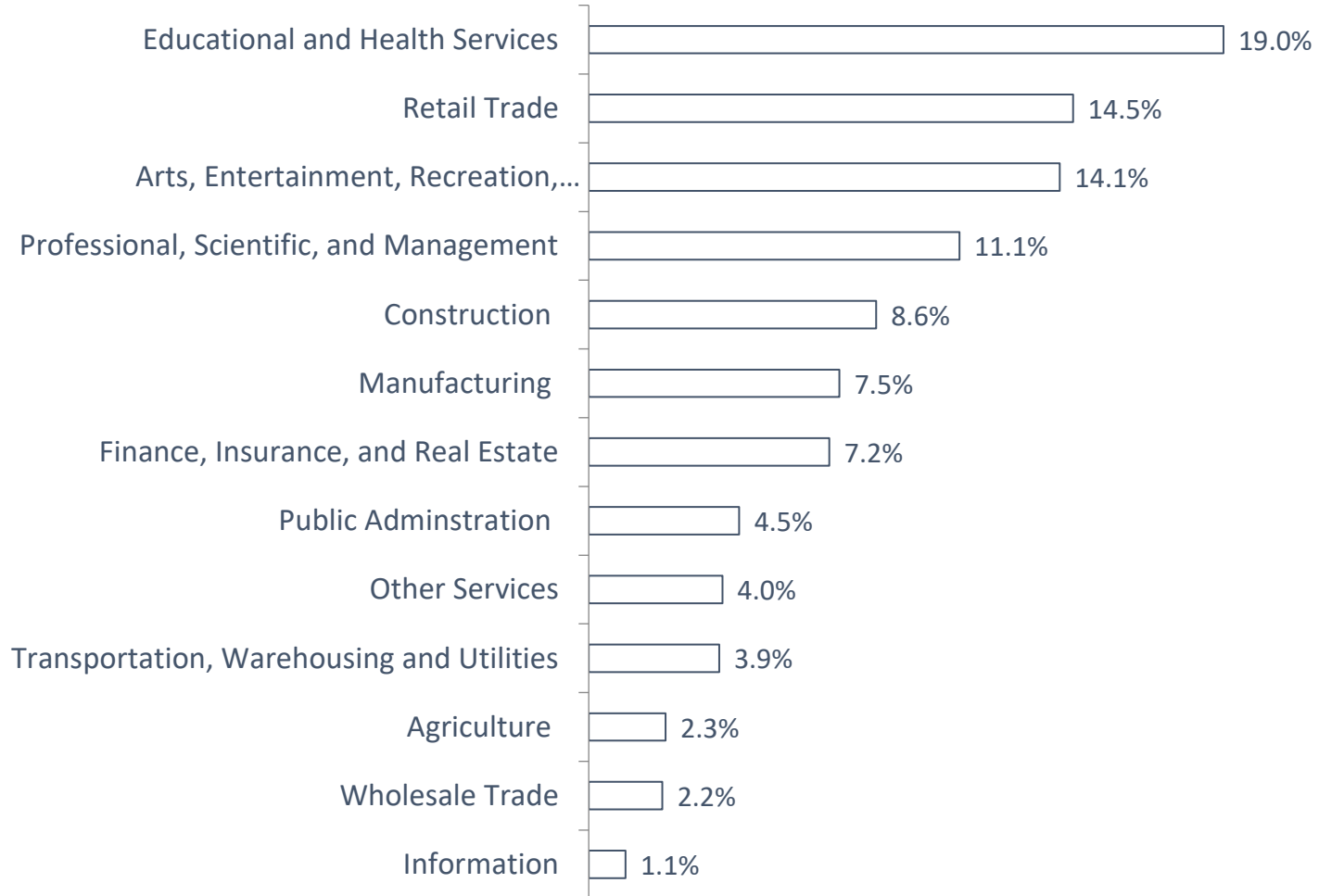
Source: U.S. Census American Community Survey 2017

INDUSTRY

**Agriculture
(% of Residents), 2017**

City	Percentage
Twin Falls, ID	4.2%
Grand Junction,…	4.0%
Missoula, MT	3.0%
Bend, OR	2.3%
Coeur d'Alene, ID	2.3%
Bozeman, MT	1.9%
Logan, UT	1.9%
Fort Collins, CO	1.6%
Boise City, ID	1.3%
Castle Rock, CO	1.2%
Flagstaff, AZ	1.1%
Boulder, CO	0.8%
Spokane, WA	0.8%
Provo, UT	0.4%

U.S. Average: 1.9%

Source: U.S. Census American Community Survey 2017

74
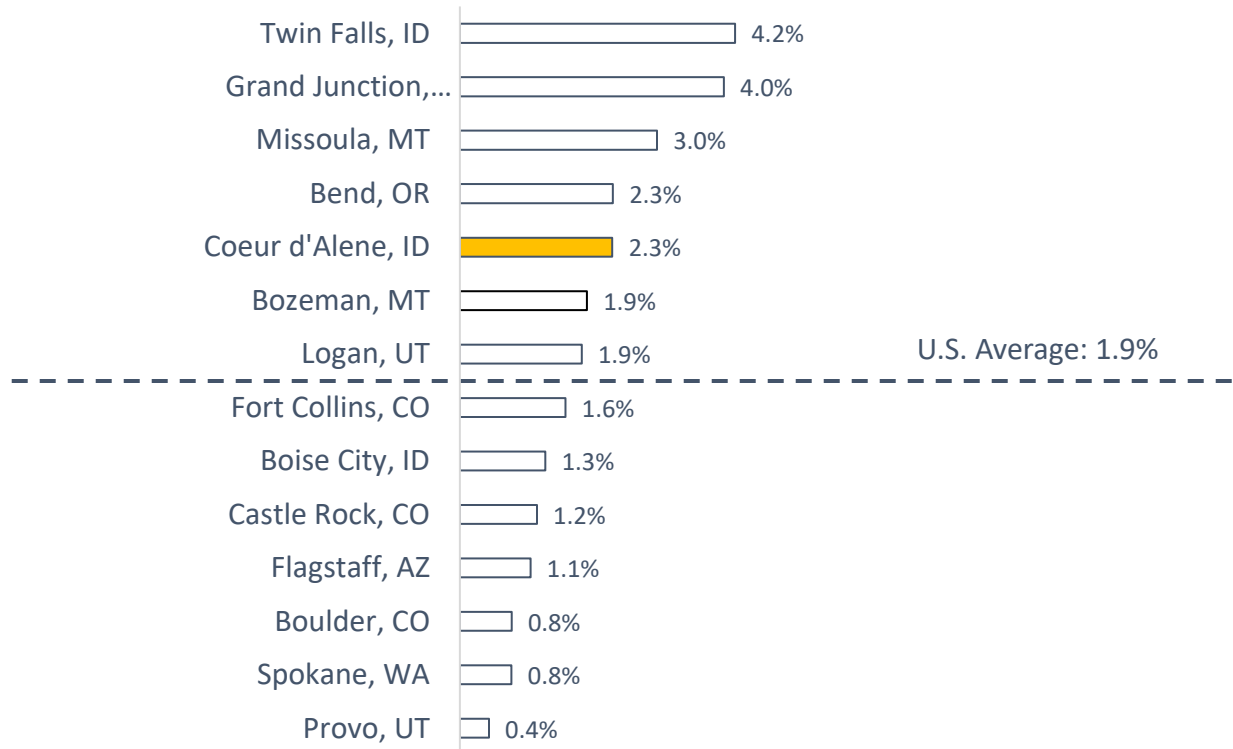
INDUSTRY

**Construction
(% of Residents), 2017**

City	%
Bozeman, MT	8.7%
Coeur d'Alene, ID	8.6%
Grand Junction,…	7.5%
Bend, OR	7.3%
Castle Rock, CO	6.7%
Missoula, MT	5.9%
Boise City, ID	5.2%
Fort Collins, CO	5.1%
Spokane, WA	4.7%
Provo, UT	4.4%
Twin Falls, ID	4.3%
Flagstaff, AZ	3.8%
Logan, UT	3.6%
Boulder, CO	2.6%

U.S. Average: 6.4%
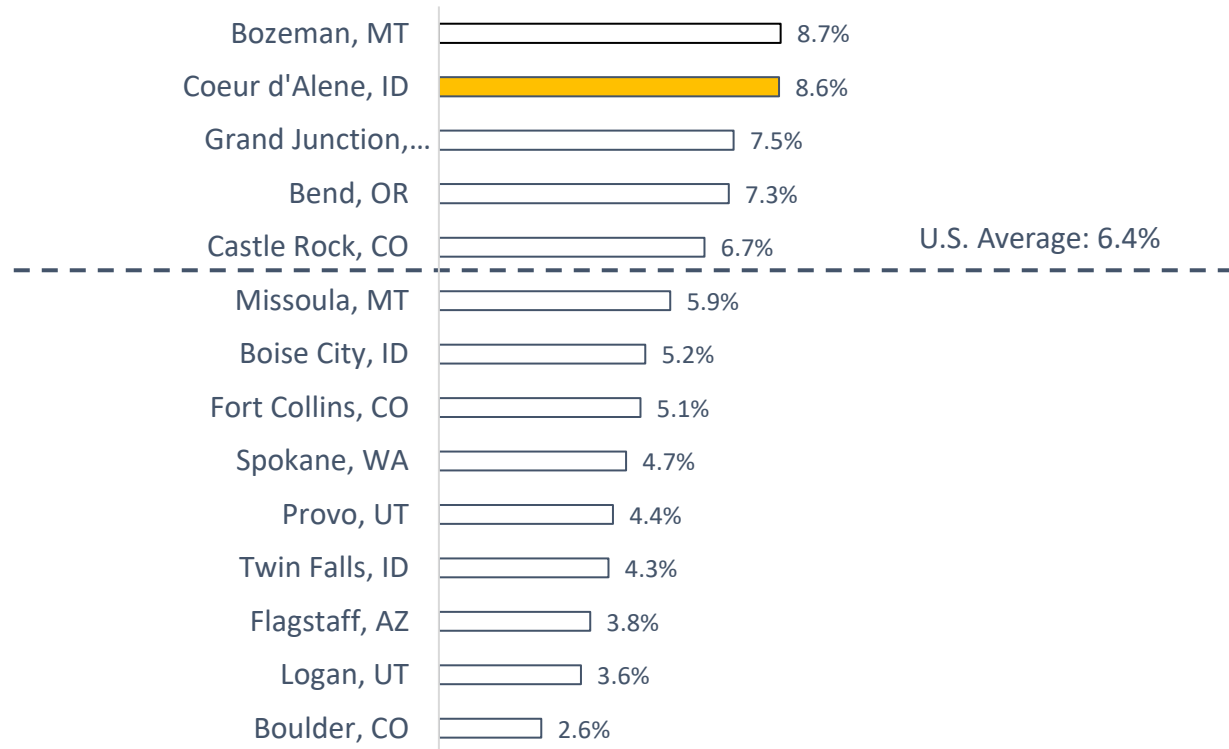
Source: U.S. Census American Community Survey 2017

INDUSTRY

**Manufacturing
(% of Residents), 2017**

City	%
Logan, UT	15.4%
Twin Falls, ID	11.2%
Boise City, ID	8.9%
Fort Collins, CO	8.8%
Flagstaff, AZ	7.7%
Coeur d'Alene, ID	7.5%
Spokane, WA	7.4%
Bend, OR	7.3%
Bozeman, MT	7.2%
Boulder, CO	6.6%
Provo, UT	6.5%
Castle Rock, CO	4.9%
Grand Junction,…	3.6%
Missoula, MT	3.2%

U.S. Average: 10.3%
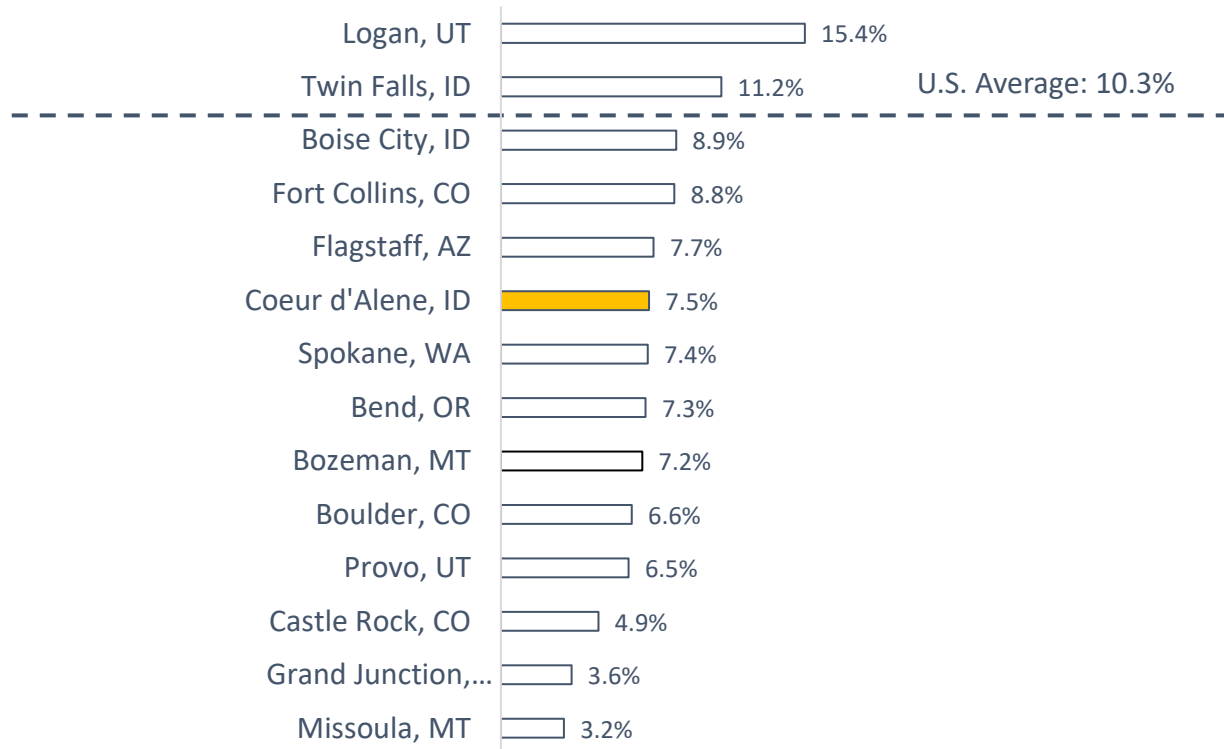
Source: U.S. Census American Community Survey 2017

INDUSTRY

Wholesale Trade
(% of Residents), 2017

City	%
Twin Falls, ID	3.6%
Spokane, WA	3.3%
Castle Rock, CO	3.2%
Grand Junction,…	2.7%
Boise City, ID	2.5%
Provo, UT	2.5%
Missoula, MT	2.4%
Coeur d'Alene, ID	2.2%
Bend, OR	2.0%
Fort Collins, CO	1.7%
Boulder, CO	1.6%
Bozeman, MT	1.5%
Logan, UT	1.0%
Flagstaff, AZ	0.6%
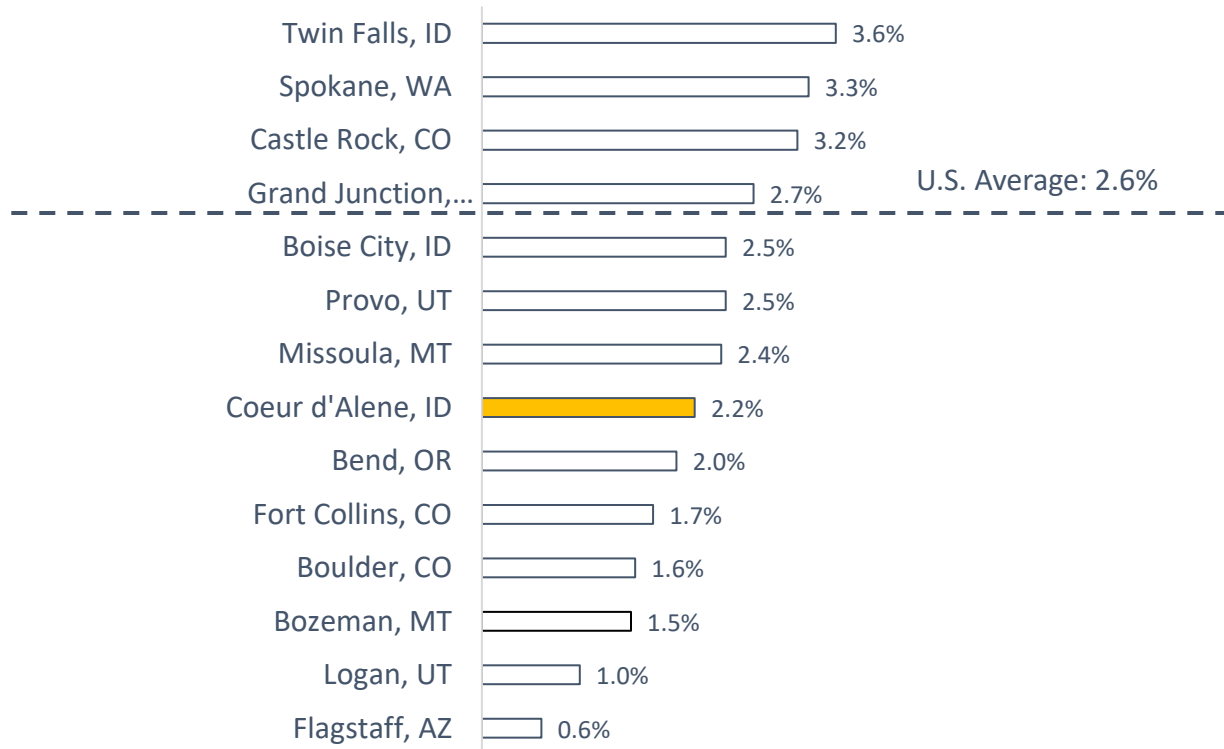
U.S. Average: 2.6%

Source: U.S. Census American Community Survey 2017

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INDUSTRY

Retail Trade
(% of Residents), 2017

City	Percentage
Twin Falls, ID	16.5%
Coeur d'Alene, ID	14.5%
Bozeman, MT	13.5%
Logan, UT	13.2%
Bend, OR	13.2%
Grand Junction,…	12.9%
Spokane, WA	12.4%
Castle Rock, CO	12.2%
Flagstaff, AZ	12.1%
Missoula, MT	11.8%
Boise City, ID	11.7%
Provo, UT	11.6%
Fort Collins, CO	10.6%
Boulder, CO	9.0%
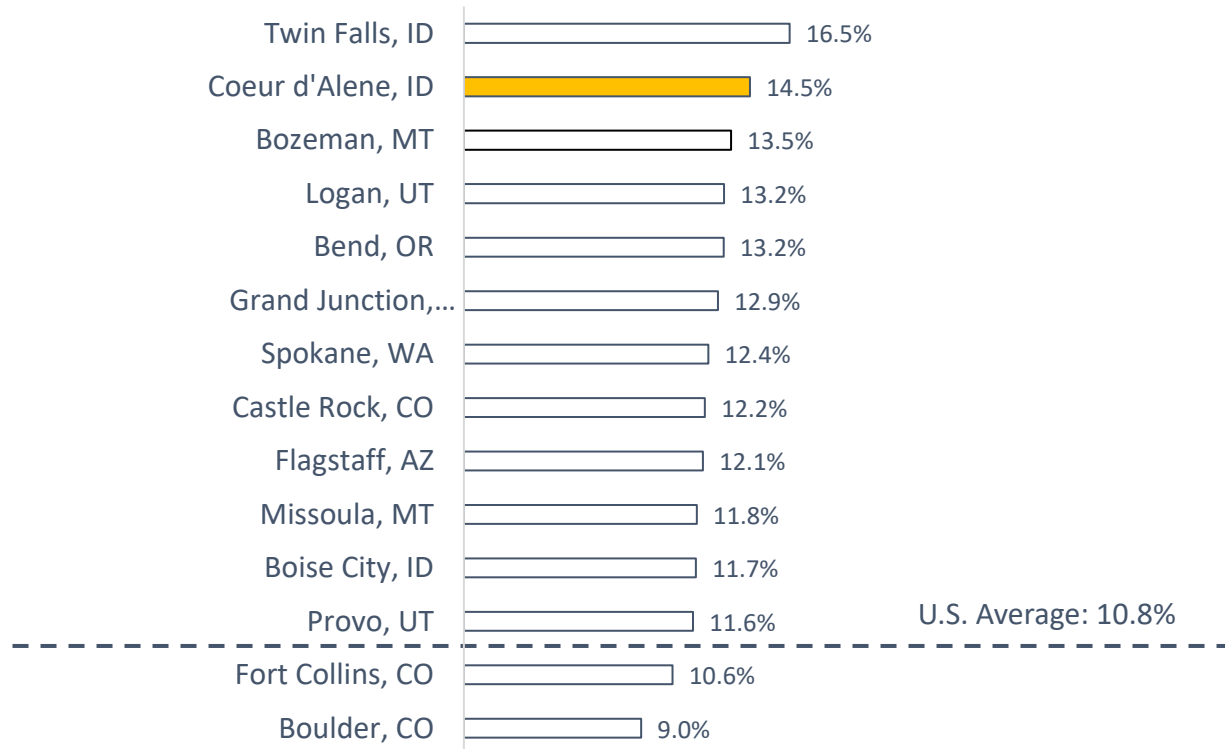
U.S. Average: 10.8%

Source: U.S. Census American Community Survey 2017

INDUSTRY

**Transportation, Warehousing, and Utilities
(% of Residents), 2017**

U.S. Average: 5.1%

City	%
Spokane, WA	4.4%
Grand Junction,…	4.3%
Twin Falls, ID	4.2%
Coeur d'Alene, ID	3.9%
Missoula, MT	3.8%
Castle Rock, CO	3.7%
Boise City, ID	3.6%
Flagstaff, AZ	3.4%
Logan, UT	2.4%
Fort Collins, CO	2.4%
Bend, OR	2.2%
Provo, UT	2.0%
Bozeman, MT	1.8%
Boulder, CO	1.5%
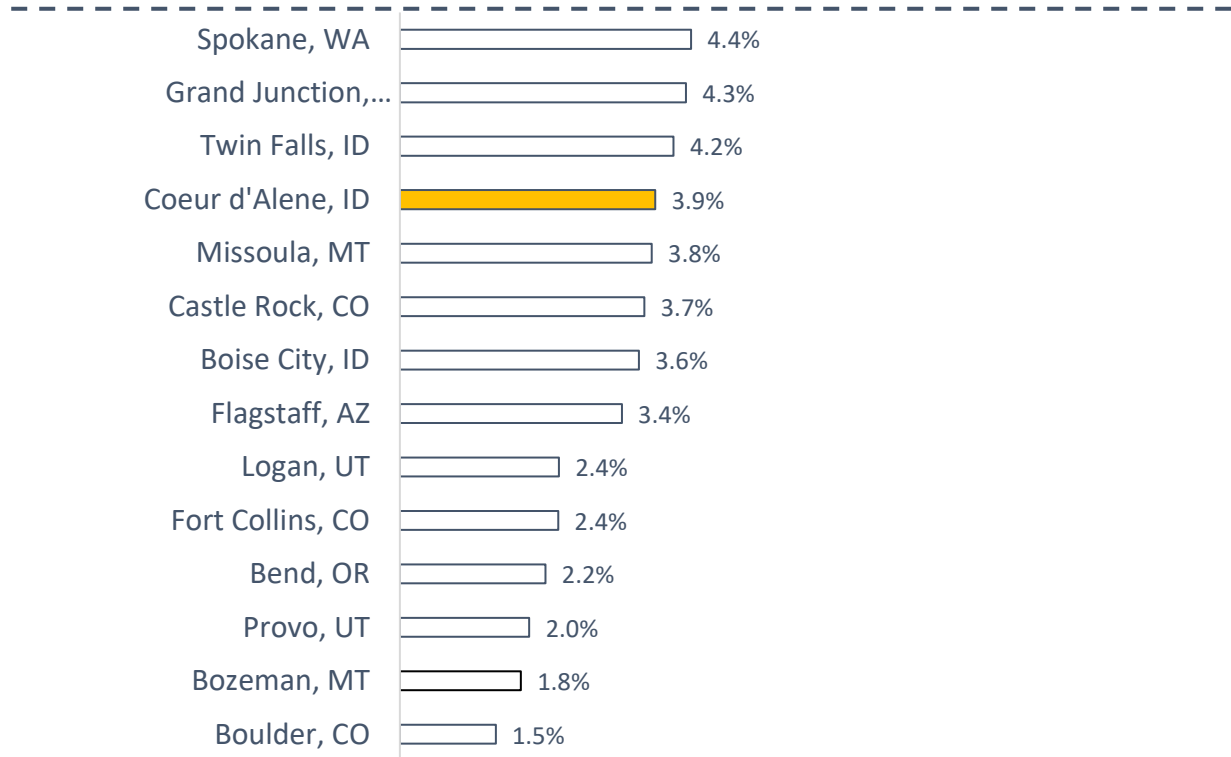
Source: U.S. Census American Community Survey 2017

INDUSTRY

**Information
(% of Residents), 2017**

City	%
Castle Rock, CO	5.5%
Boulder, CO	3.5%
Bend, OR	3.3%
Missoula, MT	3.2%
Provo, UT	2.9%
Boise City, ID	2.5%
Twin Falls, ID	2.3%
Grand Junction,…	2.3%
Logan, UT	2.0%
Spokane, WA	1.9%
Fort Collins, CO	1.8%
Flagstaff, AZ	1.4%
Bozeman, MT	1.2%
Coeur d'Alene, ID	1.1%

U.S. Average: 2.1%
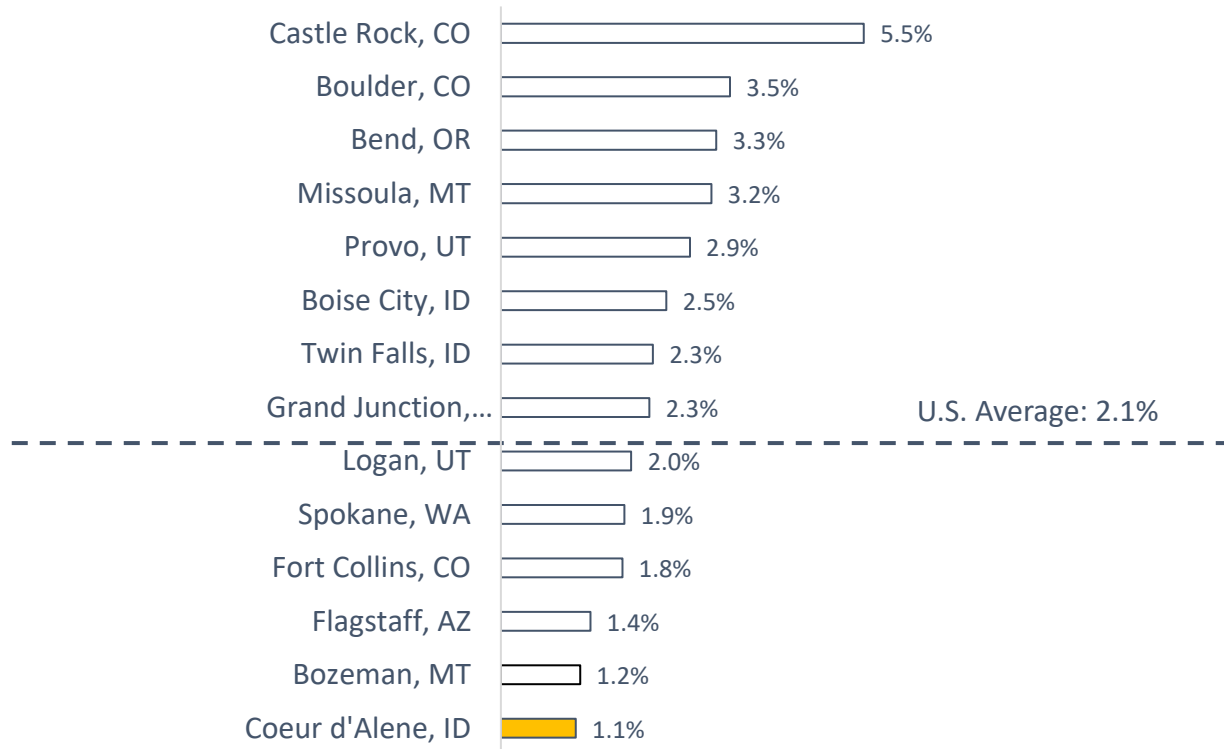
Source: U.S. Census American Community Survey 2017

INDUSTRY

**Finance, Insurance, and Real Estate
(% of Residents), 2017**

City	%
Castle Rock, CO	10.1%
Coeur d'Alene, ID	7.2%
Spokane, WA	6.5%
Boise City, ID	6.4%
Bend, OR	6.4%
Missoula, MT	6.1%
Fort Collins, CO	5.8%
Grand Junction,…	5.3%
Bozeman, MT	4.9%
Provo, UT	4.5%
Boulder, CO	4.2%
Twin Falls, ID	3.8%
Flagstaff, AZ	3.6%
Logan, UT	3.6%

U.S. Average: 6.6%
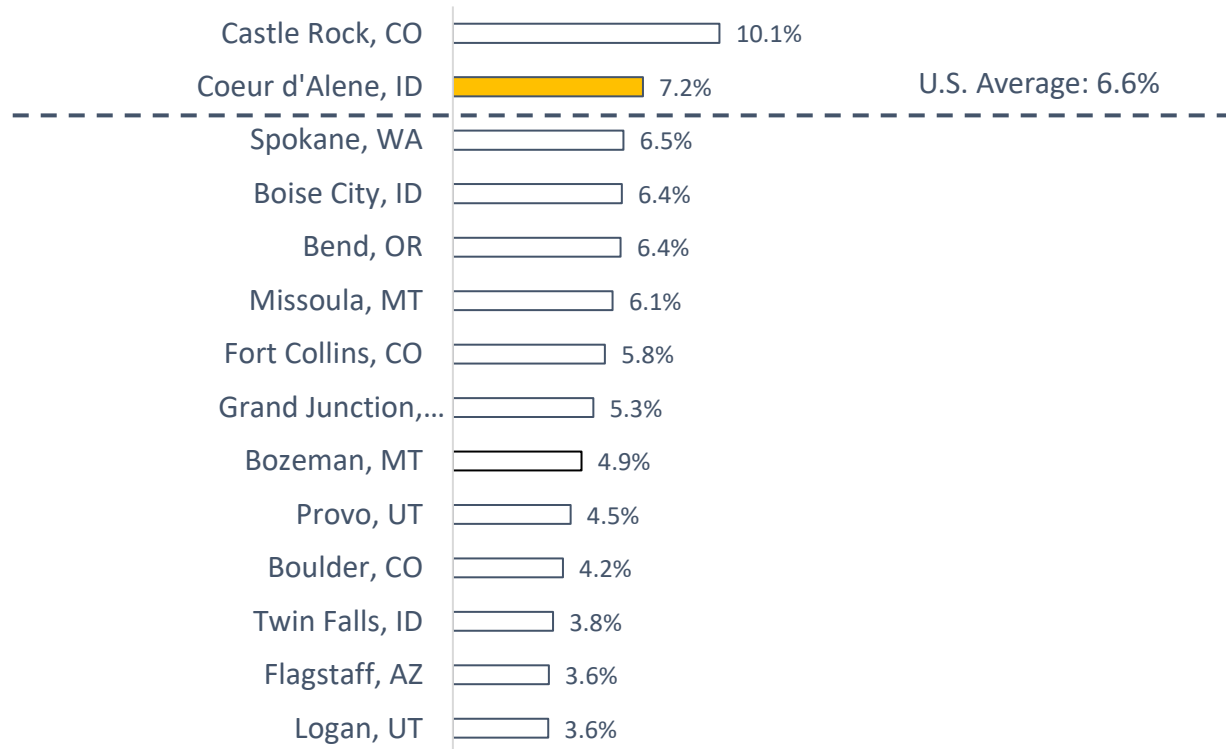
Source: U.S. Census American Community Survey 2017

INDUSTRY

**Professional, Scientific, and Management
(% of Residents), 2017**

City	%
Boulder, CO	20.9%
Provo, UT	14.6%
Castle Rock, CO	14.4%
Boise City, ID	13.5%
Fort Collins, CO	13.0%
Bend, OR	12.8%
Logan, UT	12.2%
Grand Junction,…	11.8%
Bozeman, MT	11.1%
Coeur d'Alene, ID	11.1%
Missoula, MT	11.1%
Spokane, WA	9.5%
Twin Falls, ID	8.9%
Flagstaff, AZ	7.5%

U.S. Average: 11.3%
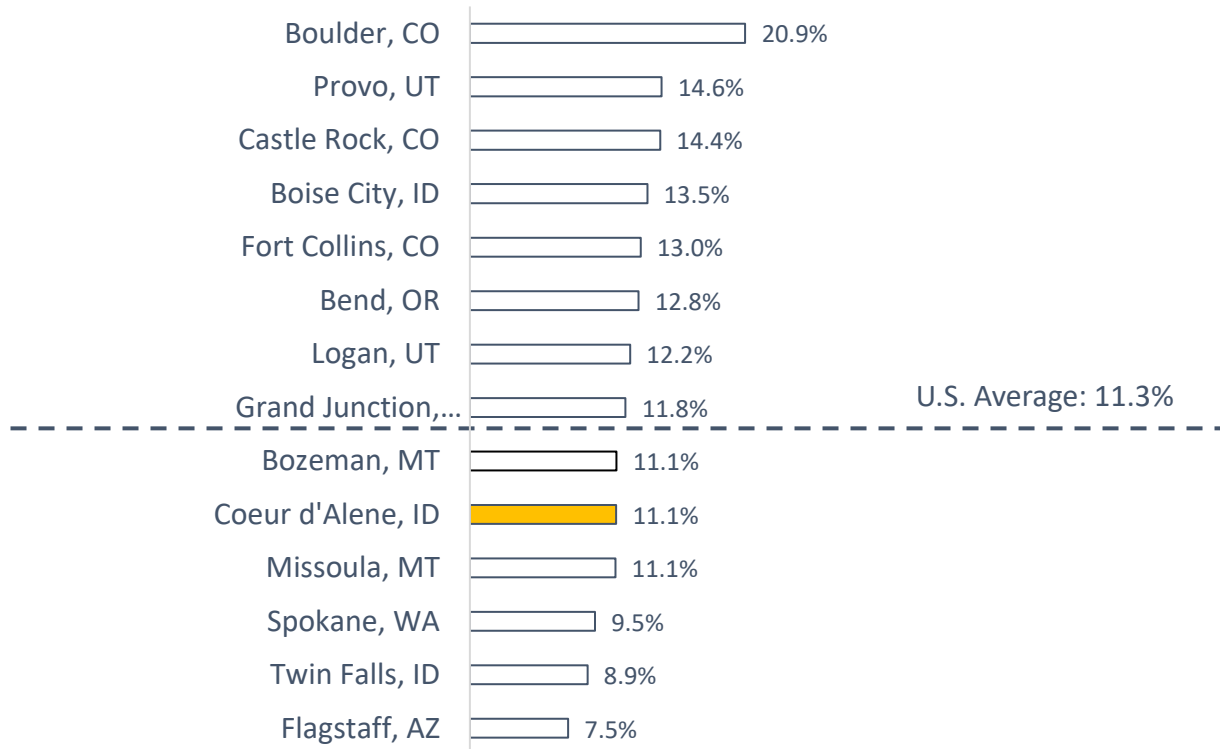
Source: U.S. Census American Community Survey 2017

INDUSTRY

Arts, Entertainment, Recreation, Accommodation, and Food Service (% of Residents), 2017

City	%
Flagstaff, AZ	20.0%
Boulder, CO	14.6%
Bozeman, MT	14.1%
Coeur d'Alene, ID	14.1%
Missoula, MT	13.8%
Fort Collins, CO	12.9%
Bend, OR	12.7%
Spokane, WA	12.0%
Logan, UT	11.4%
Twin Falls, ID	10.7%
Boise City, ID	10.4%
Provo, UT	10.0%
Grand Junction,…	9.2%
Castle Rock, CO	8.6%

U.S. Average: 9.7%
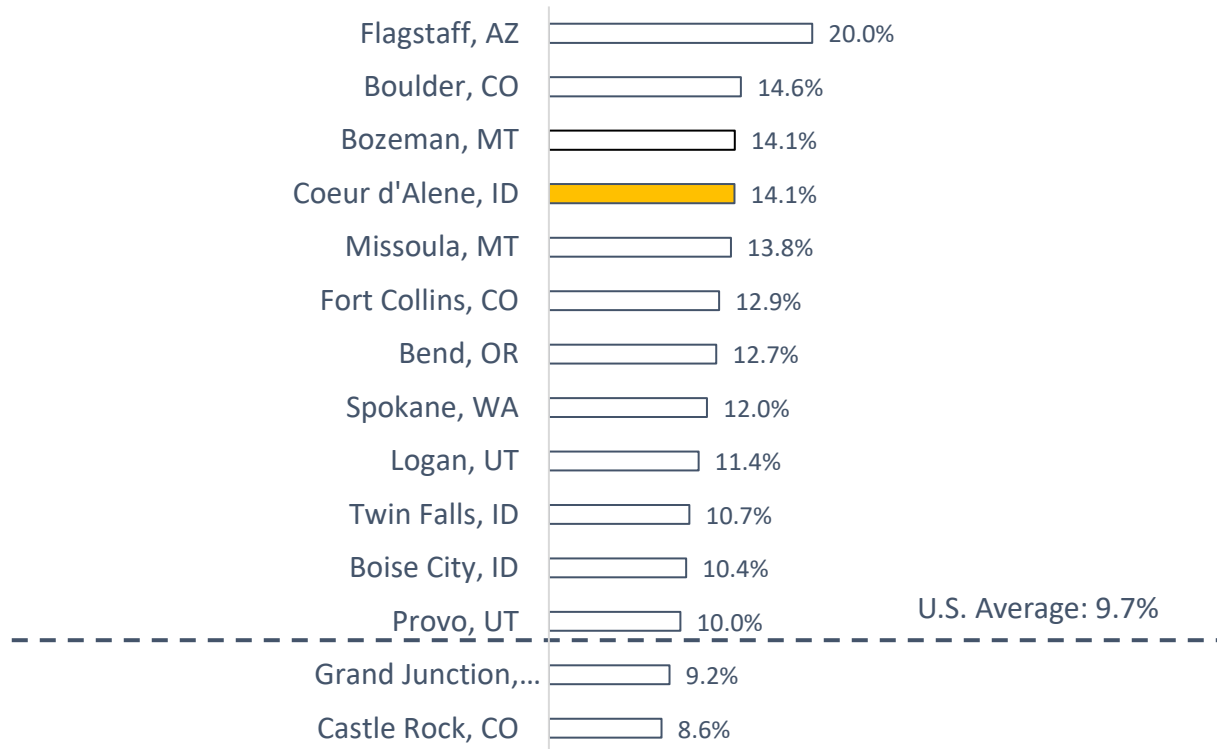
Source: U.S. Census American Community Survey 2017

INDUSTRY

**Educational and Health Services
(% of Residents), 2017**

City	Percentage
Provo, UT	34.0%
Flagstaff, AZ	30.1%
Missoula, MT	28.3%
Logan, UT	27.8%
Fort Collins, CO	27.7%
Bozeman, MT	27.6%
Boulder, CO	27.3%
Spokane, WA	27.1%
Grand Junction,…	26.7%
Boise City, ID	23.9%
Bend, OR	22.4%
Twin Falls, ID	21.9%
Coeur d'Alene, ID	19.0%
Castle Rock, CO	18.8%
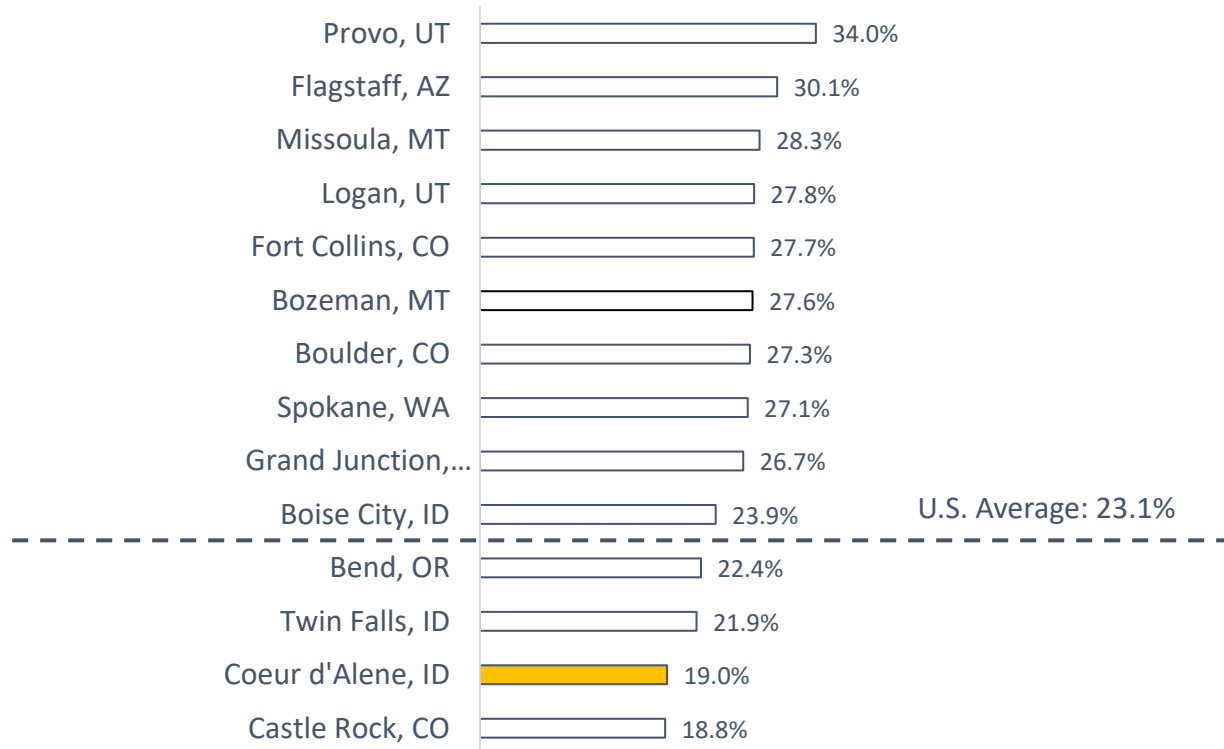
U.S. Average: 23.1%

Source: U.S. Census American Community Survey 2017

INDUSTRY

**Other Services
(% of Residents), 2017**

City	%
Grand Junction,…	5.5%
Spokane, WA	5.2%
Provo, UT	5.1%
Fort Collins, CO	5.0%
Bend, OR	4.8%
Castle Rock, CO	4.6%
Twin Falls, ID	4.5%
Boulder, CO	4.4%
Boise City, ID	4.2%
Missoula, MT	4.2%
Logan, UT	4.1%
Coeur d'Alene, ID	4.0%
Bozeman, MT	3.8%
Flagstaff, AZ	3.4%
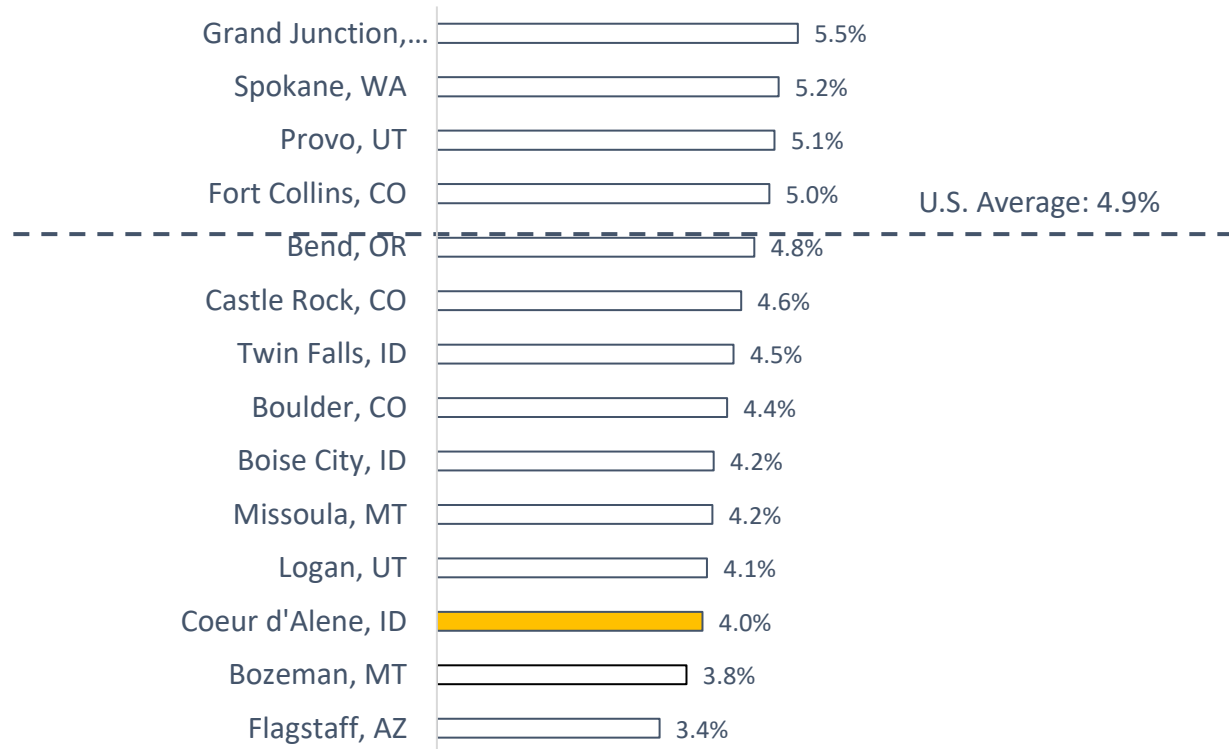
U.S. Average: 4.9%

Source: U.S. Census American Community Survey 2017

INDUSTRY

**Public Administration
(% of Residents), 2017**

U.S. Average: 11.3%

City	%
Castle Rock, CO	6.0%
Boise City, ID	5.8%
Flagstaff, AZ	5.3%
Spokane, WA	4.7%
Coeur d'Alene, ID	4.5%
Grand Junction,…	4.3%
Twin Falls, ID	4.0%
Fort Collins, CO	3.5%
Bend, OR	3.3%
Missoula, MT	3.3%
Boulder, CO	3.1%
Bozeman, MT	2.6%
Provo, UT	1.6%
Logan, UT	1.6%

Source: U.S. Census American Community Survey 2017

86
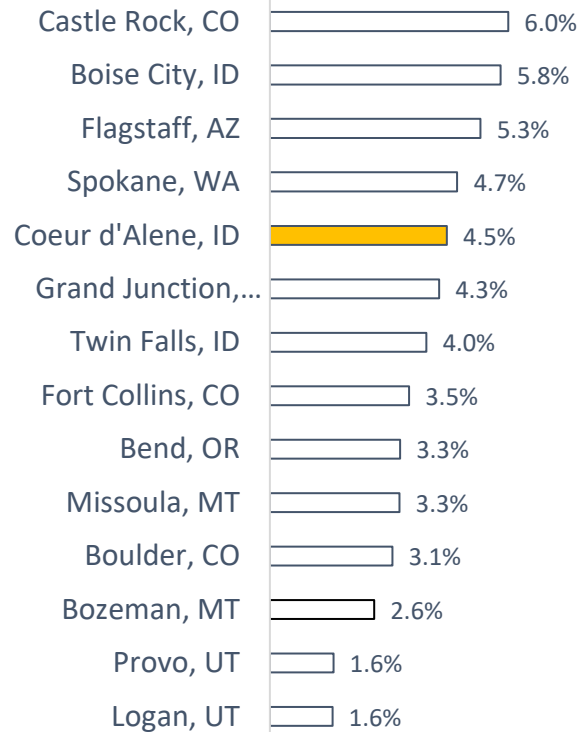
COMMUTING

TAKEAWAYS

- **Driving to Work.**
  8 in 10 Coeur d'Alene residents drive to work.

- **Short Commute Time.**
  Coeur d'Alene commute time is 17.9 minutes – 9 minutes shorter than the U.S. average.

COMMUTING

Means of Commuting (% of Workforce), 2017

- 0.4%
- 2.8%
- 3.0%
- 3.4%
- 8.0%
- 81.2%

■ Public Transit   ■ Other Means   ■ Walked to Work

■ Worked at Home   ■ Carpooled   ■ Car/ Drove Alone

Source: U.S. Census American Community Survey 2017

89
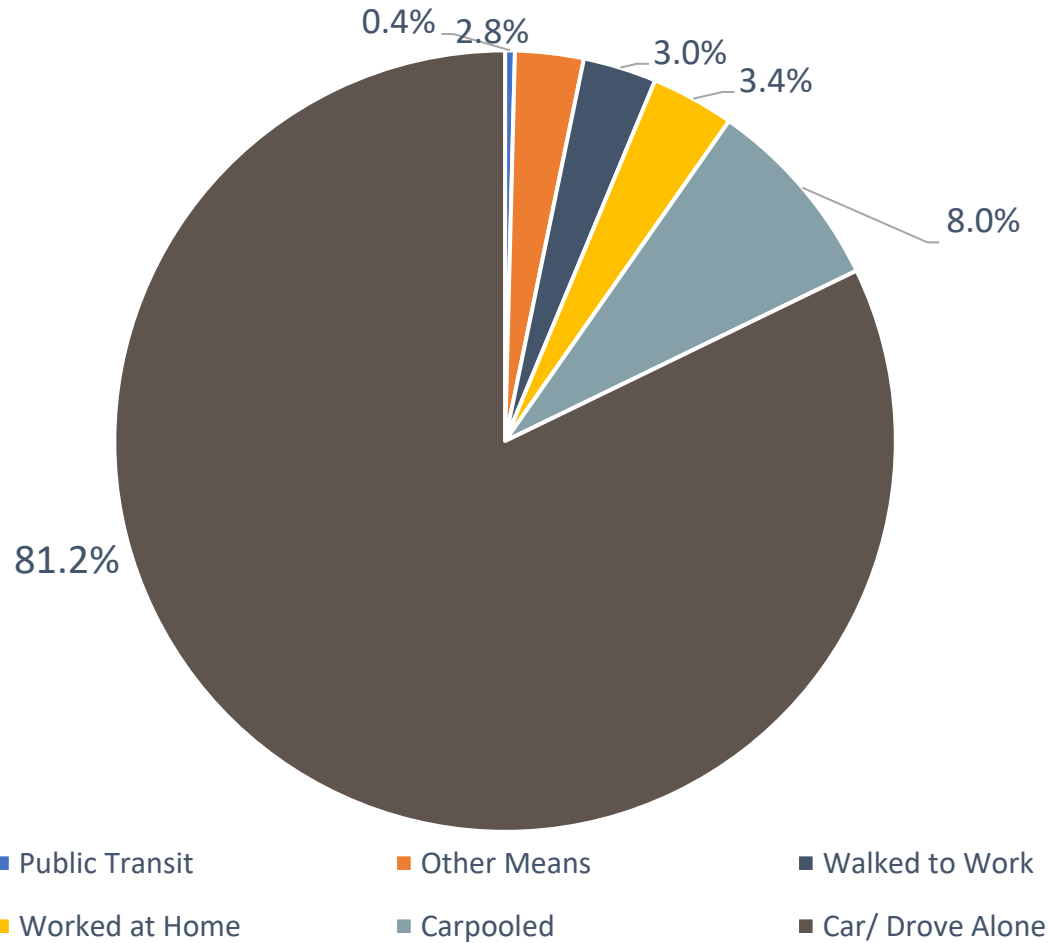
COMMUTING

Car/ Drove Alone
(% of Workforce), 2017

City	Percentage
Twin Falls, ID	81.7%
Coeur d'Alene, ID	81.2%
Boise City, ID	79.6%
Castle Rock, CO	79.0%
Spokane, WA	75.4%
Grand Junction,…	74.7%
Bend, OR	72.6%
Fort Collins, CO	71.0%
Bozeman, MT	69.8%
Logan, UT	69.5%
Missoula, MT	69.4%
Flagstaff, AZ	66.9%
Provo, UT	61.2%
Boulder, CO	49.5%

U.S. Average: 76.4%

Source: U.S. Census American Community Survey 2017

90
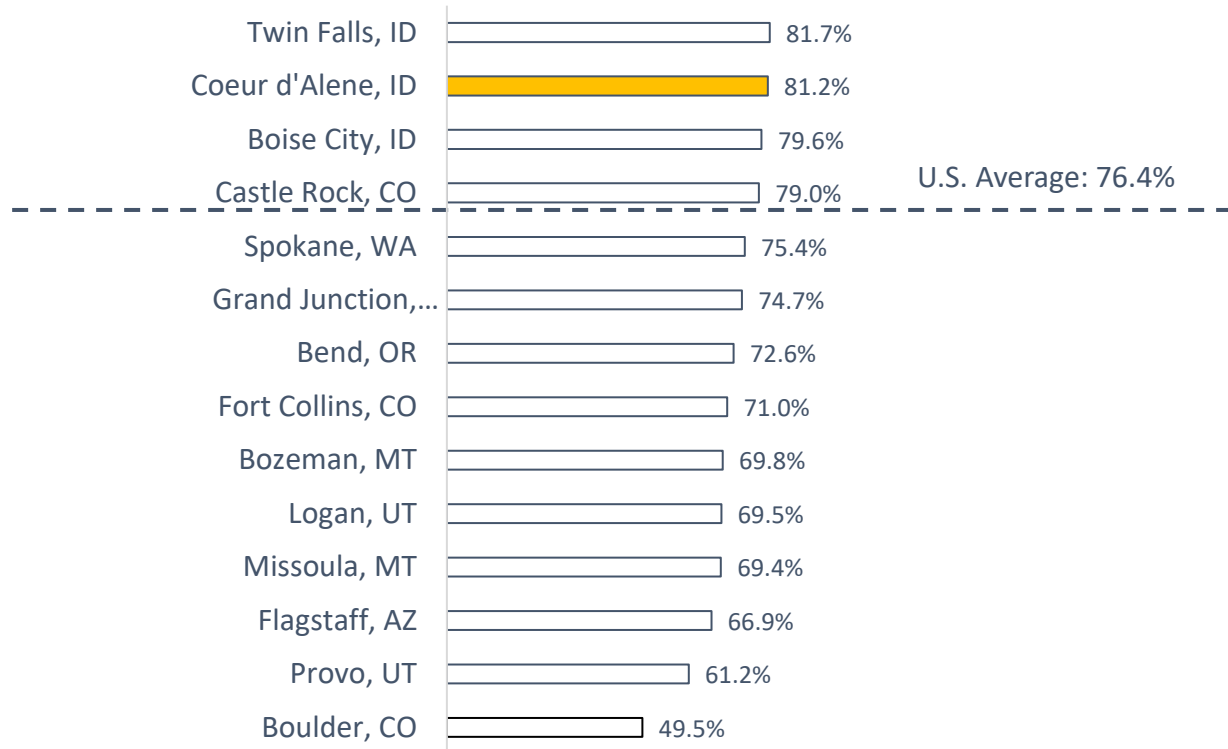
COMMUTING

Carpooled
(% of Workforce), 2017

City	Percentage
Provo, UT	12.5%
Logan, UT	11.6%
Twin Falls, ID	9.8%
Flagstaff, AZ	9.6%
Spokane, WA	9.3%
Grand Junction,...	9.0%
Coeur d'Alene, ID	8.0%
Bozeman, MT	8.0%
Fort Collins, CO	7.8%
Castle Rock, CO	7.7%
Bend, OR	7.4%
Boise City, ID	7.3%
Missoula, MT	6.4%
Boulder, CO	5.4%

U.S. Average: 9.2%

Source: U.S. Census American Community Survey 2017

91
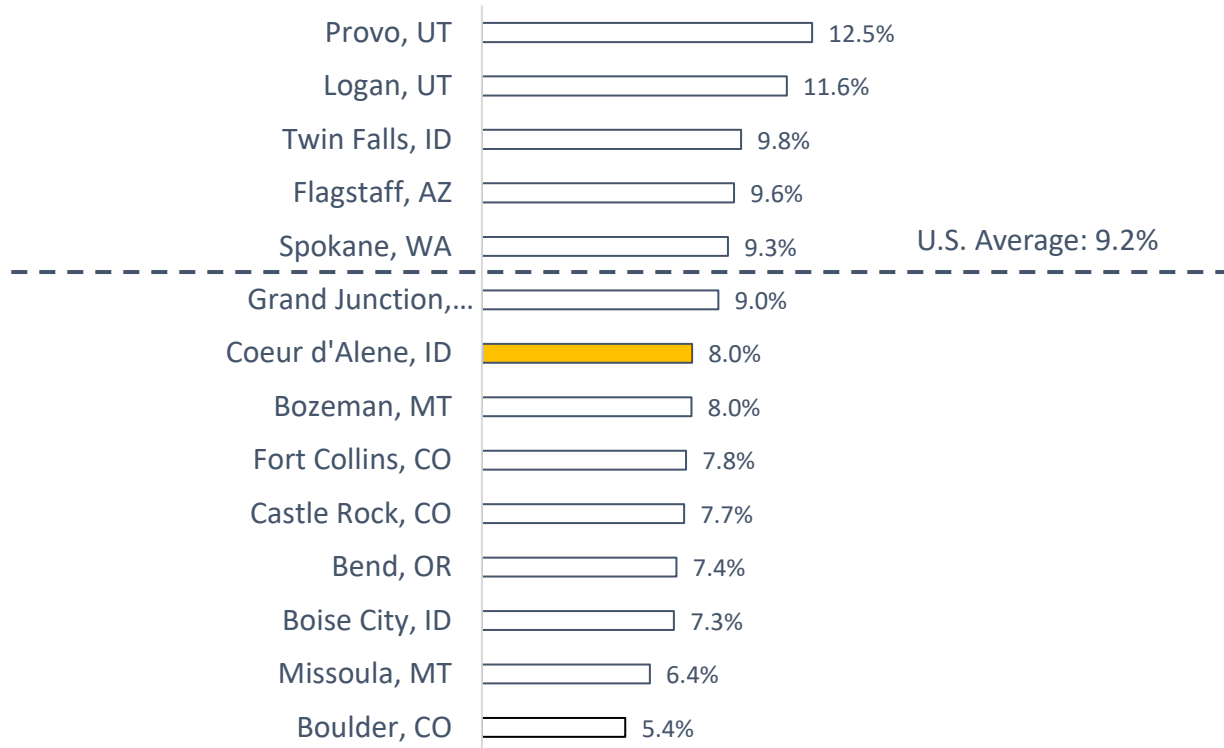
COMMUTING

Public Transit
(% of Workforce), 2017

City	%
Boulder, CO	7.7%
Spokane, WA	3.9%
Logan, UT	3.3%
Provo, UT	2.9%
Missoula, MT	2.7%
Flagstaff, AZ	2.1%
Fort Collins, CO	1.9%
Boise City, ID	0.7%
Bozeman, MT	0.6%
Castle Rock, CO	0.6%
Bend, OR	0.4%
Coeur d'Alene, ID	0.4%
Grand Junction,…	0.4%
Twin Falls, ID	0.3%

U.S. Average: 5.1%

Source: U.S. Census American Community Survey 2017

92
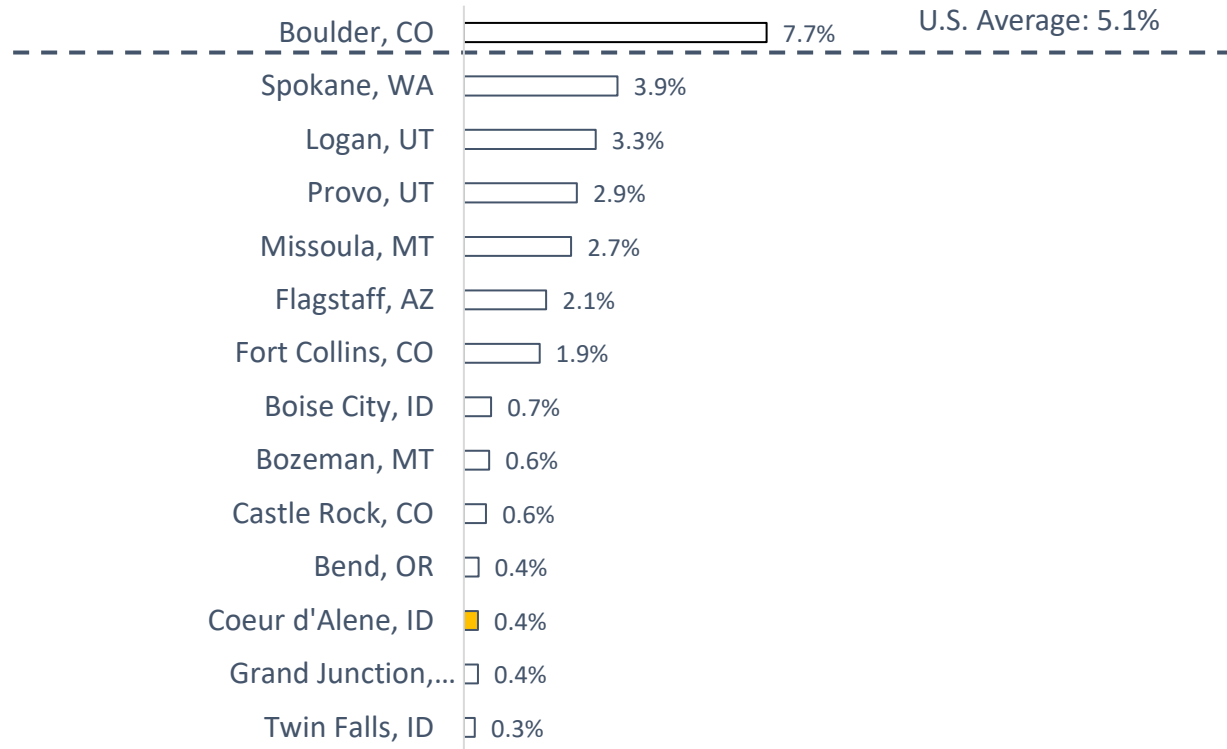
COMMUTING

**Walked to Work
(% of Workforce), 2017**

City	%
Provo, UT	12.2%
Boulder, CO	11.0%
Flagstaff, AZ	10.2%
Bozeman, MT	9.2%
Missoula, MT	7.2%
Logan, UT	6.4%
Grand Junction,…	5.0%
Bend, OR	3.5%
Fort Collins, CO	3.5%
Spokane, WA	3.4%
Coeur d'Alene, ID	3.0%
Twin Falls, ID	2.0%
Boise City, ID	2.0%
Castle Rock, CO	0.7%

U.S. Average: 2.7%
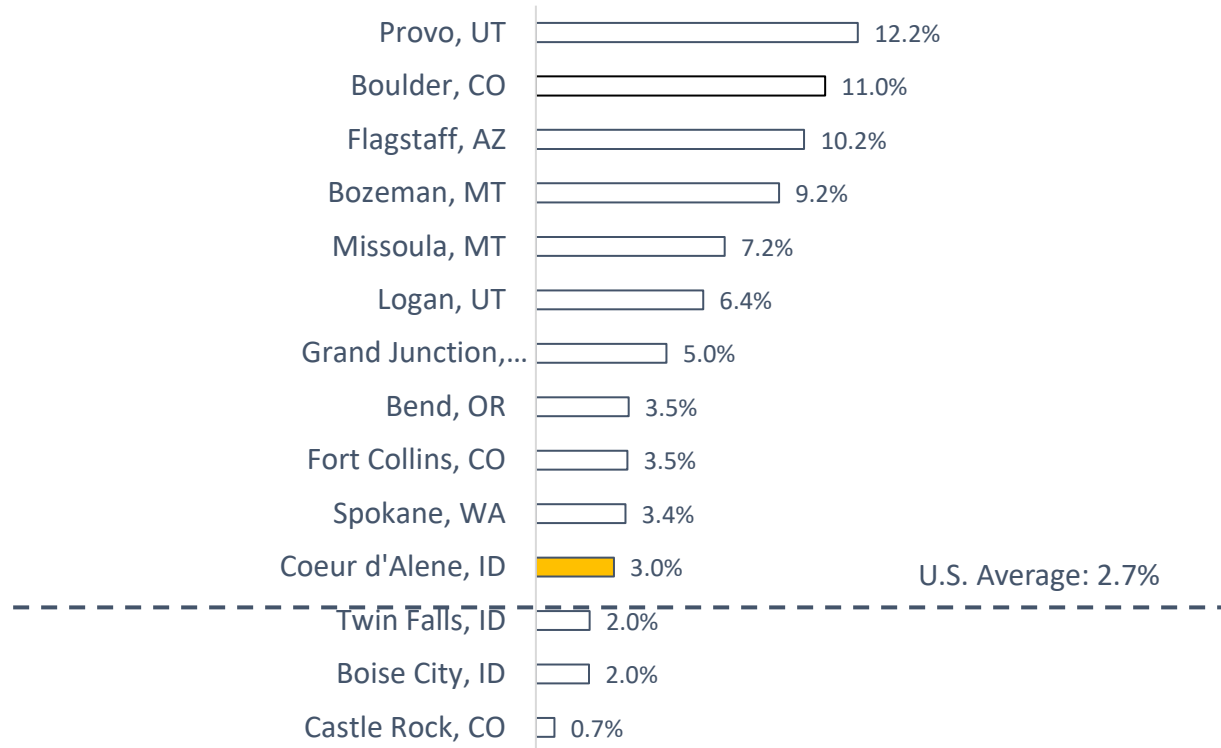
Source: U.S. Census American Community Survey 2017

COMMUTING

**Other Means
(% of Workforce), 2017**

City	%
Boulder, CO	11.2%
Fort Collins, CO	7.3%
Missoula, MT	7.2%
Bozeman, MT	5.4%
Flagstaff, AZ	5.2%
Provo, UT	4.1%
Logan, UT	3.9%
Bend, OR	3.7%
Boise City, ID	3.7%
Grand Junction,…	3.5%
Coeur d'Alene, ID	2.8%
Castle Rock, CO	2.3%
Spokane, WA	1.9%
Twin Falls, ID	1.7%

U.S. Average: 1.8%
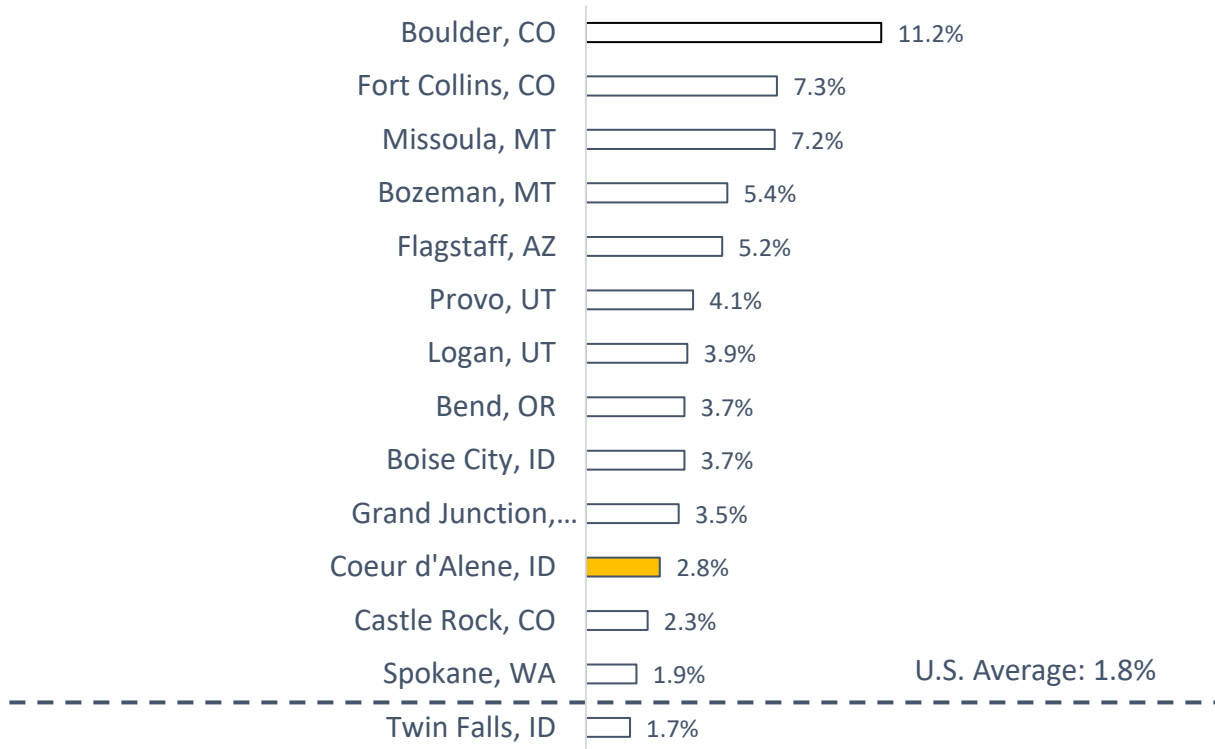
Source: U.S. Census American Community Survey 2017

COMMUTING

**Worked from Home
(% of Workforce), 2017**

City	%
Boulder, CO	12.5%
Bend, OR	10.2%
Castle Rock, CO	9.2%
Fort Collins, CO	6.7%
Grand Junction,…	5.8%
Bozeman, MT	5.4%
Boise City, ID	5.4%
Provo, UT	4.7%
Spokane, WA	4.6%
Missoula, MT	4.6%
Logan, UT	4.1%
Flagstaff, AZ	3.7%
Coeur d'Alene, ID	3.4%
Twin Falls, ID	2.7%

U.S. Average: 4.7%

Source: U.S. Census American Community Survey 2017

95
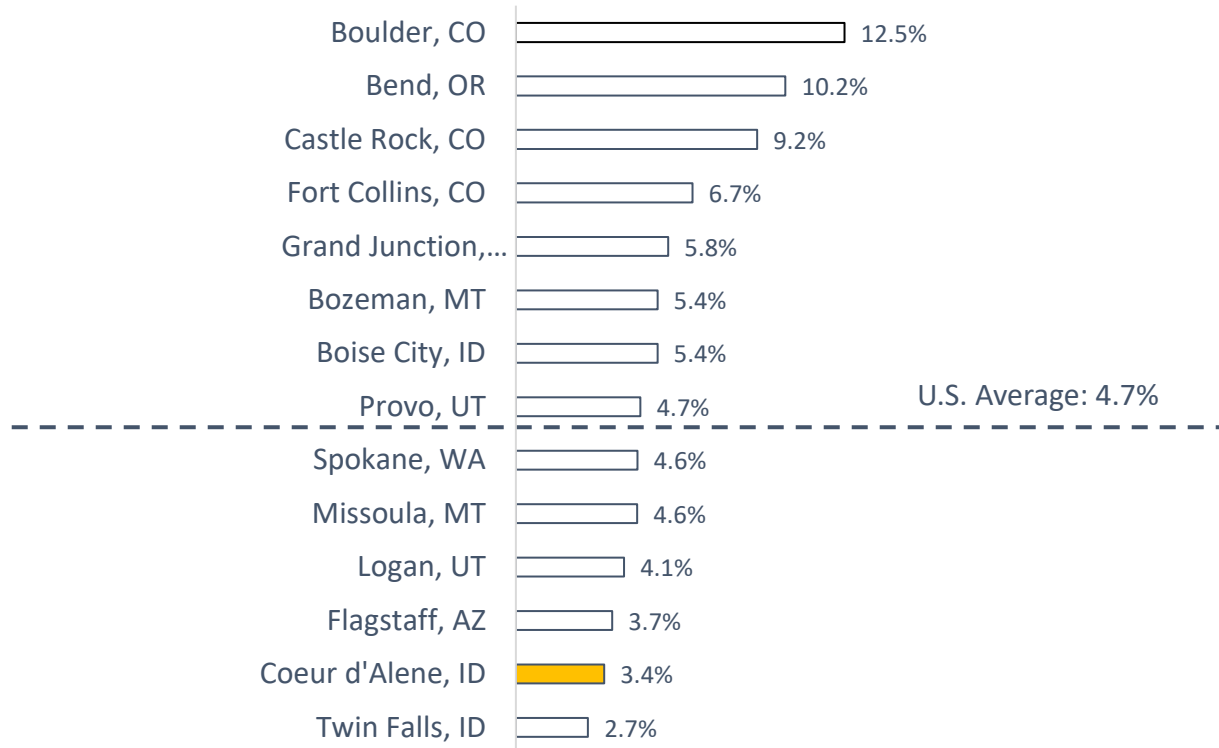
COMMUTING

**Average Commute Time
(In Minutes), 2017**

City	Minutes
Castle Rock, CO	29.1
Spokane, WA	20.1
Fort Collins, CO	19.6
Boulder, CO	19.1
Boise City, ID	18.4
Coeur d'Alene, ID	17.9
Provo, UT	17.8
Grand Junction,…	16.3
Twin Falls, ID	16.2
Missoula, MT	15.8
Flagstaff, AZ	15.7
Bend, OR	15.3
Bozeman, MT	14.6
Logan, UT	14.4

U.S. Average: 26.4

Source: U.S. Census American Community Survey 2017

96
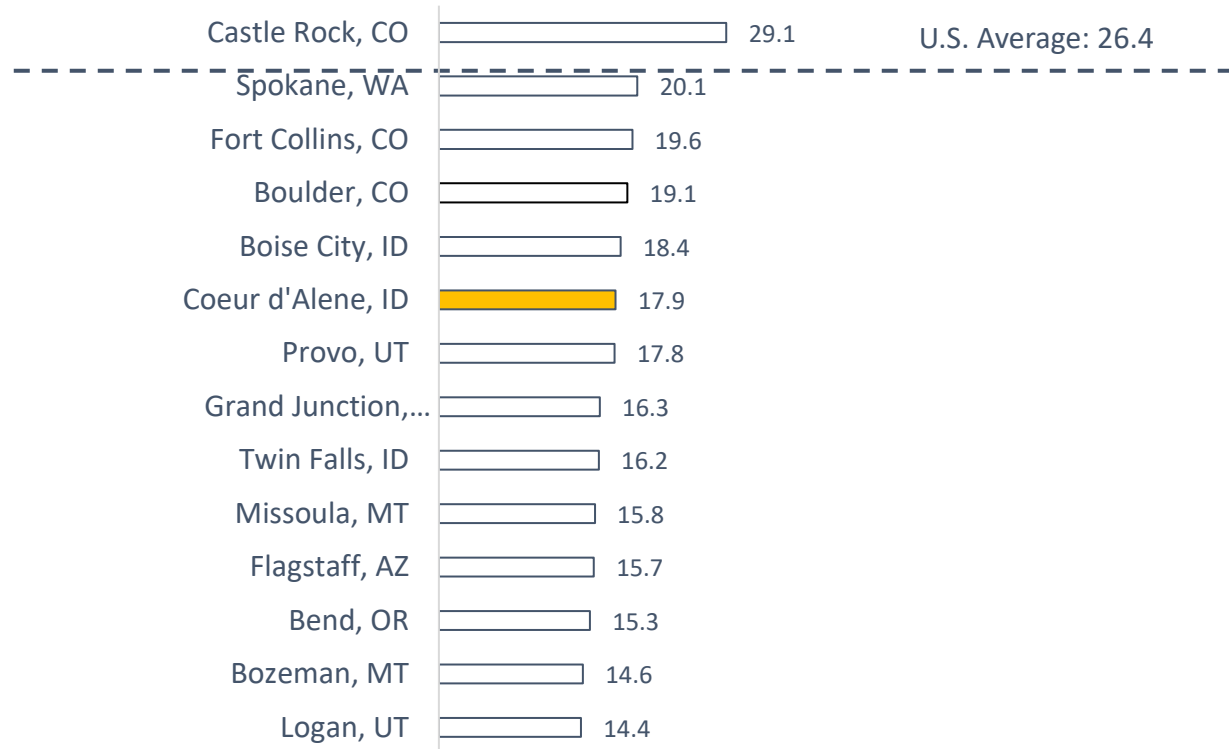
ATTACHMENT B: Industry Cluster Analysis

COEUR D'ALENE INDUSTRY ANALYSIS

DECEMBER 2019

TRADED vs. LOCAL SECTOR INDUSTRIES

TRADED SECTOR

Traded-sector industries are the engines of regional economies. They are the focus of economic development efforts because:

- They serve markets in other regions or nations and bring new money into an economy
- They typically have higher wages
- These companies often generate innovation and spin-offs
- Example industries: aircraft manufacturing, management consulting, iron ore mining

LOCAL SECTOR

Sell products and services primarily for the local market and are generally located in every region. They are important because:

- They provide important services communities need
- They make a community distinct with unique local offerings.
- Example industries: drug stores, physician offices, elementary schools, radio networks

Traded Sector	Local Sector

INDUSTRY ANALYSIS

- An industry cluster is a regional concentration of related traded-sector industries that arise out of the various types of linkages or externalities that span across industries in a particular location. They are the building blocks of modern economies, and they profile the economy of a location.

- Industry clusters are defined by groupings of similar businesses that are categorized by North American Industry Classification System (NAICS) codes.

- Industry clusters are measured by a Location Quotient (LQ), which is a way of quantifying how "concentrated" an industry is in a region compared to a larger geographic area such as the state or nation. The following information compares the CdA and Spokane areas with the nation.

- The following information is derived from the U.S. Cluster Mapping site, which provides over 50 million open data records on industry clusters and regional business environments in the U.S. to promote economic growth and national competitiveness. It is led by Harvard Business School's Institute for Strategy and Competitiveness in partnership with the U.S. Department of Commerce and U.S. Economic Development Administration.

TAKE AWAYS

- Minimal overlap with Spokane and Coeur d'Alene metropolitan area industry clusters.
- Only similar cluster is Upstream Metals, however Spokane is declining whereas Coeur d'Alene is increasing the job base.
- Coeur d'Alene Cluster Overview:
  - Wood products is a strong cluster, but declining employment.
  - Metals are strong clusters and growing employment.
  - Strong overlap between Information Technology and Lighting through electrical and electronic components.
  - Marketing is emerging suggesting that creative industries and remote workers want to locate in Coeur d'Alene over Spokane.
- Aerospace cluster is dependent on six county Spokane Economic Area (Kootenai, Bonner, ID; Spokane, Whitman, Stevens, Pend Oreille, WA).
- Aircraft sector employment is growing but significantly smaller than other regions in the United States.
- Hospitality is a cluster because it brings new money into the economy. However it does not have the other attributes of traded-sector industries.

COEUR D'ALENE

CdA Top Industries

Industry	Employment	Industry LQ	Establishments
Wood Products	680	6.21	24
Lighting	395	4.57	5
Upstream Metals	515	4.49	7
Downstream Metals	480	3.81	10
Hospitality	2,486	2.58	44
Information Technology	635	1.86	6
Marketing	460	1.14	35

Source: US Cluster Mapping, Information based on Kootenai County

HOSPITALITY

Example Businesses and NAICS
- Casino Hotels (721120)
- Bed-and-Breakfast Inns (721191)
- RV (Recreational Vehicle) Parks and Campgrounds (721211)
- Hotels (except Casino Hotels) and Motels (721110)
- Amusement and Theme Parks (713110)
- Recreational and Vacation Camps (except Campgrounds) (721214)

2016	Employment	Industry LQ	Establishments
Hospitality	2,486	2.58	44

Hospitality

Legend: ■ 2016 Employment ■ 1998 Employment
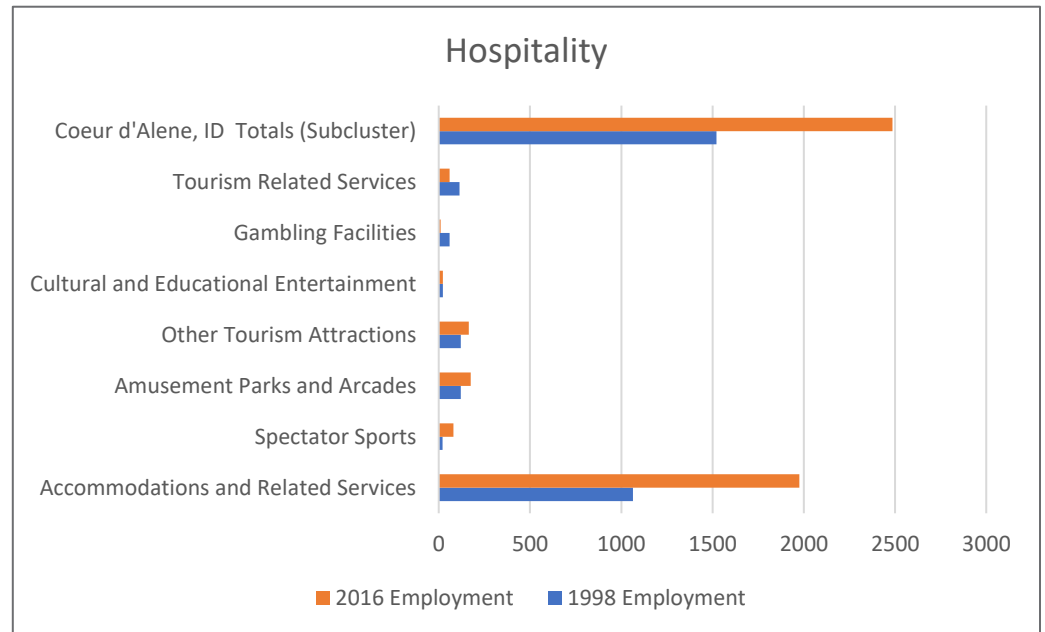
WOOD PRODUCTS

Example Businesses and NAICS

- Wood Window and Door Manufacturing (321911)
- All Other Miscellaneous Wood Product Manufacturing (321999)
- Softwood Veneer and Plywood Manufacturing (321212)
- Reconstituted Wood Product Manufacturing (321219)
- Truss Manufacturing (321214)
- Wood Container and Pallet Manufacturing (321920)
- Other Millwork (including Flooring) (321918)
- Cut Stock, Resawing Lumber, and Planing (321912)
- Sawmills (321113)
- Wood Preservation (321114)
- Prefabricated Wood Building Manufacturing (321992)

2016	Employment	Industry LQ	Establishments
Wood Products	680	6.21	24

Wood Products bar chart showing 2016 Employment and 1998 Employment for Coeur d'Alene, ID Totals (Subcluster), Wood Processing, Wood Components and Products, and Prefabricated Wood Building.

UPSTREAM METALS

Upstream vs. Downstream:
Upstream refers to the material inputs needed for production, while downstream is the opposite end, where products get produced and distributed.

Example Businesses and NAICS
- Secondary Smelting, Refining, and Alloying of Nonferrous Metal (except Copper and Aluminum) Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding (331491)
- Spring Manufacturing (332613)
- Steel Wire Drawing (331222)
- Other Fabricated Wire Product Manufacturing (332618)

2016	Employment	Industry LQ	Establishments
Upstream Metals	515	4.49	7

Upstream Metals

Category	
Coeur d'Alene, ID Totals (Subcluster)	
Iron and Steel Mills and Forging	
Metal Products	
Wires and Springs	
Metal Processing	

2016 Employment   1998 Employment
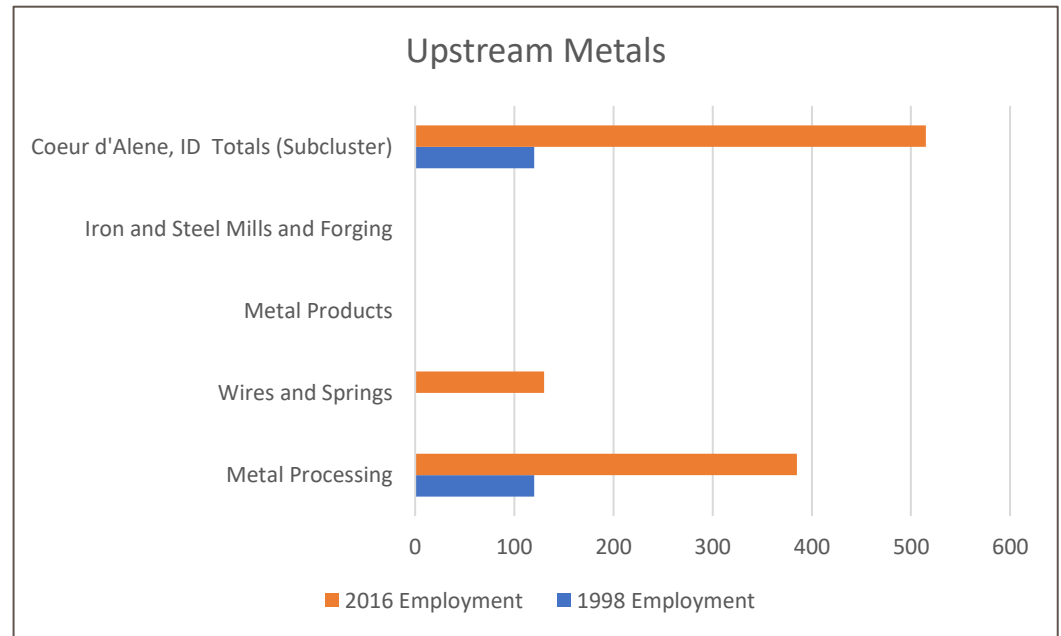
DOWNSTREAM METALS

Example Businesses and NAICS

- All Other Miscellaneous Fabricated Metal Product Manufacturing (332999)
- Metal Kitchen Cookware, Utensil, Cutlery, and Flatware (except Precious) Manufacturing (332215)
- Saw Blade and Handtool Manufacturing (332216)
- Ornamental and Architectural Metal Work Manufacturing (332323)
- Small Arms Manufacturing (332994)
- Ammunition (except Small Arms) Manufacturing (332993)

2016	Employment	Industry LQ	Establishments
Downstream Metals	480	3.81	10

Downstream Metals

11
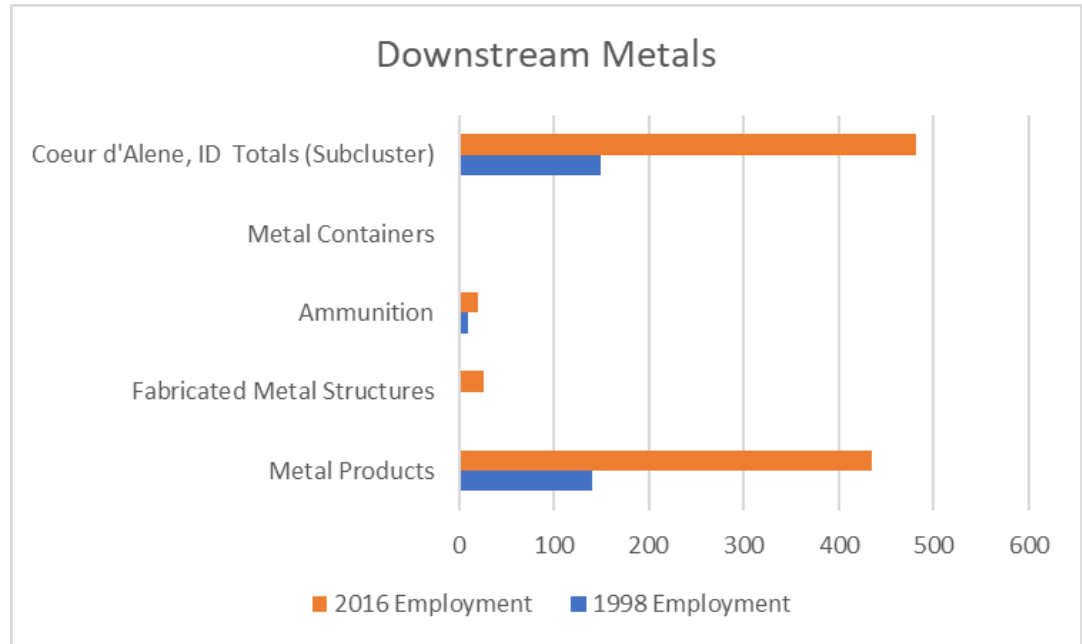
INFORMATION TECHNOLOGY

Example Businesses and NAICS

- Computer Terminal and Other Computer Peripheral Equipment Manufacturing (334118)
- Printed Circuit Assembly (Electronic Assembly) Manufacturing (334418)
- Analytical Laboratory Instrument Manufacturing (334516)
- Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals (334515)
- Other Measuring and Controlling Device Manufacturing (334519)
- Audio and Video Equipment Manufacturing (334310)

2016	Employment	Industry LQ	Establishments
Information Technology	**635**	**1.86**	**6**

Information Technology

(Bar chart comparing 2016 Employment and 1998 Employment across categories: Coeur d'Alene, ID Totals (Subcluster), Electronic Components, Semiconductors, Software Publishers, Software Reproducing, Process and Laboratory Instruments, Medical Apparatus, Audio and Video Equipment, Computers and Peripherals)
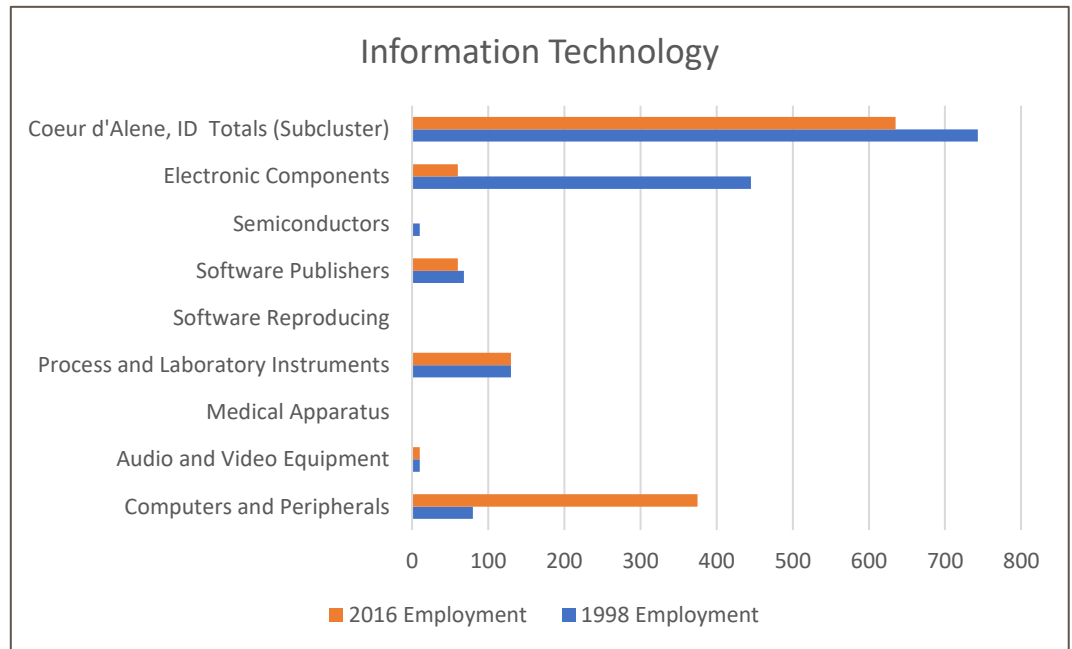
LIGHTING

Example Businesses and NAICS
- All Other Miscellaneous Electrical Equipment and Component Manufacturing (335999)
- Relay and Industrial Control Manufacturing (335314)
- Commercial, Industrial, and Institutional Electric Lighting Fixture Manufacturing (335122)

2016	Employment	Industry LQ	Establishments
Lighting	395	4.57	5

Lighting — bar chart of 2016 Employment (orange) and 1998 Employment (blue) by category: Coeur d'Alene, ID Totals (Subcluster), Lighting Fixtures and Parts, Storage Batteries, Electrical Equipment, Electrical Components.
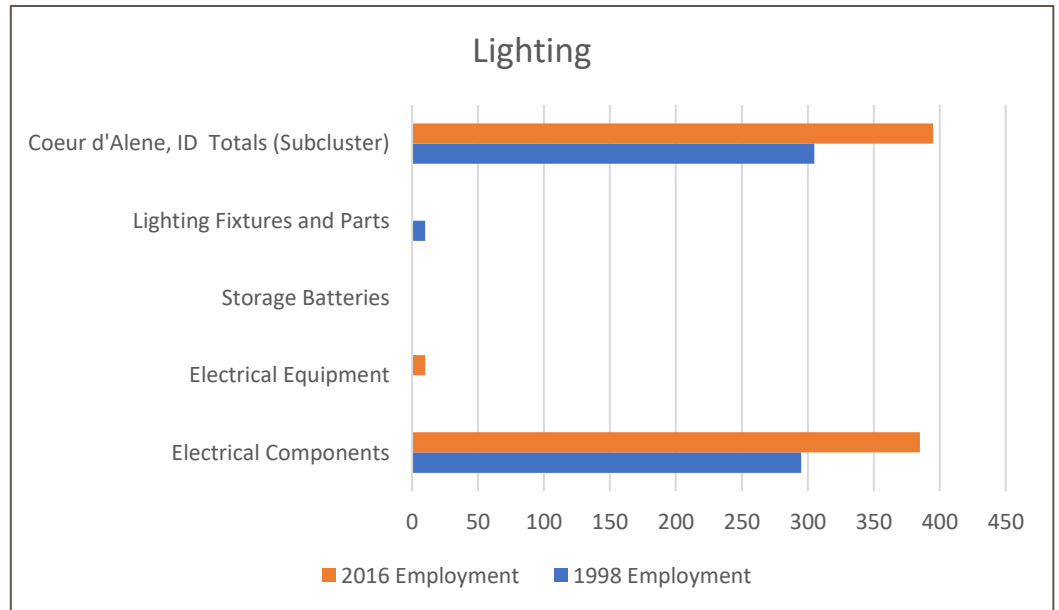
SPOKANE

INDUSTRY ANALYSIS

Due to the CDA region proximity to Spokane, Washington, we reviewed the industry competitiveness of Spokane to determine if there are complimentary factors that should be considered. In summary:

- The Spokane region does not have as many diverse industry opportunities as CDA.
- The one industry found in both regions is upstream metals. As the regions continue to focus on aerospace, this specific industry should be better understood to leverage supply chains and market opportunities.

Spokane Top Industries

	Employment	Industry LQ
Upstream Metals	2,155	4.39
Biopharmaceuticals	760	2.40
Communication Equipment	841	1.51
Insurance	3,993	1.89
Education	5,731	1.42
Distribution and E-Commerce	8,792	1.19

Upstream Metals Comparison

Upstream Metals CdA and Spokane
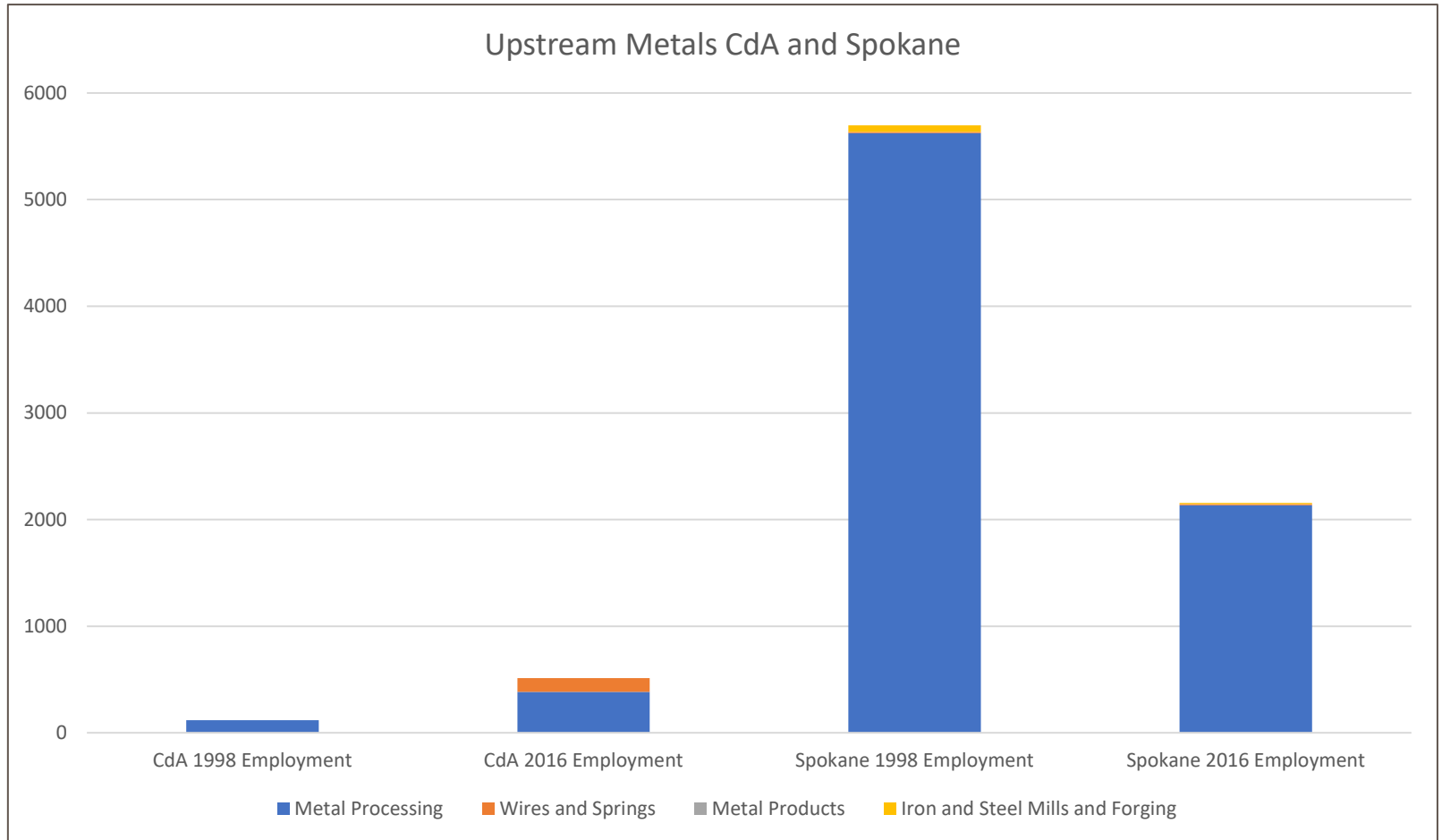
AEROSPACE INDUSTRY

Spokane Economic Area Aerospace

Aerospace Spokane Economic Area

- Spokane, WA Totals (Subcluster)
- Missiles and Space Vehicles
- Search and Navigation Equipment
- Aircraft

(x-axis: 0, 200, 400, 600, 800, 1000, 1200, 1400, 1600, 1800)

■ 2016 Employment ■ 1998 Employment
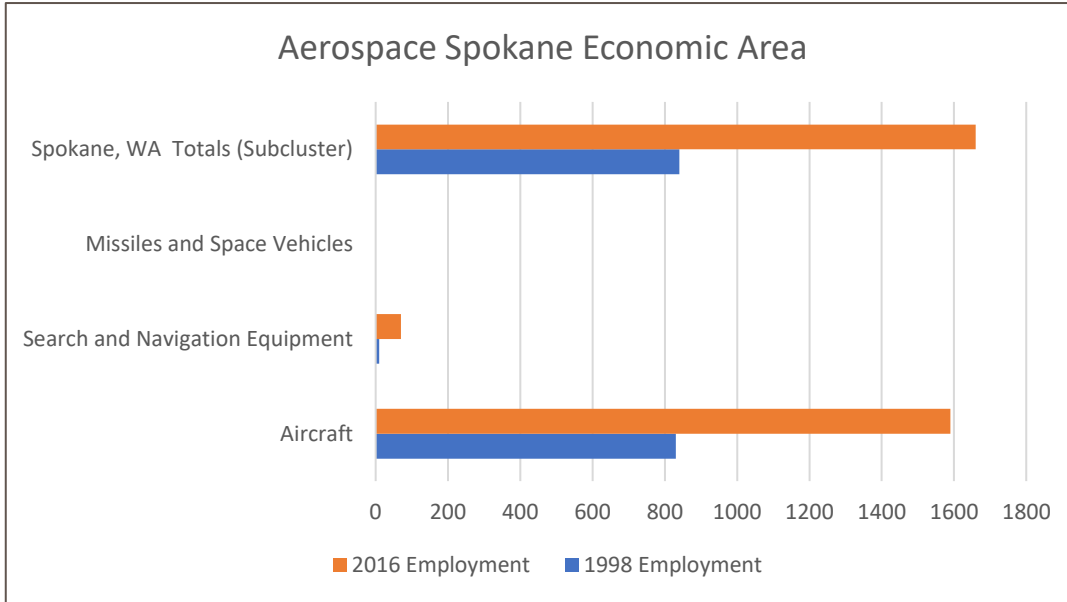
Spokane Total Employment: 1,660
Spokane LQ: 1.61
Kootenai Employment Share: 10% and within "other" parts includes such items as crop dusting apparatus, armament racks, inflight refueling equipment, and external fuel tanks.

Aircraft sub-sector	Aircraft Manufacturing 336411		Aircraft Parts 336412		Other Parts 336413	
County	Emp	Estab	Emp	Estab	Emp	Estab
Bonner	375	1			173	3
Kootenai					152	3
Spokane	60	3			750	4
Whitman	10	1				
Stevens	10	1				
Pend Oreille						

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2016 Aerospace Employment
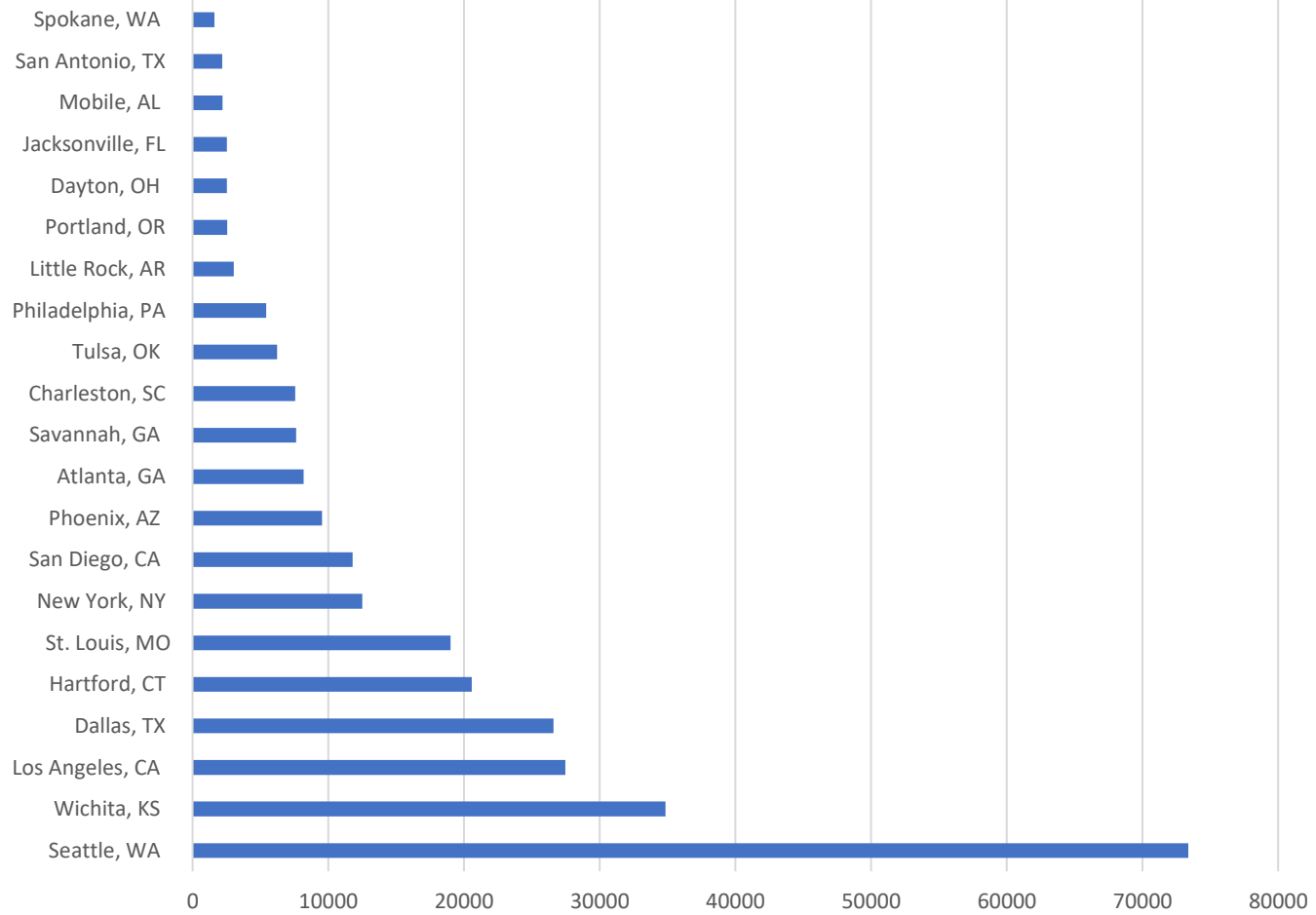
ATTACHMENT C: Skills and Occupation Analysis

COEUR D'ALENE TALENT ANALYSIS

NOVEMBER 2019

COEUR D'ALENE MSA

TAKEAWAYS

- **Service Sector.**
  Half of Coeur d'Alene MSA workers (35,000) have skills aligned with the service sector — 12% larger than the U.S. average.

- **Working Sector.**
  Coeur d'Alene's working sector (traditional blue-collar) is 7% larger than the U.S. average (for a community its size), employing nearly 18,000 residents and up approximately 16% since 2014.

- **Knowledge Sector.**
  Approximately 26% Coeur d'Alene workers are knowledge workers – 11 percent less than the U.S. average. In the past five years, however, the Knowledge Sector in the region has expanded the most — nearly 21%. The Knowledge Sector, especially those with skills in health, computers and business, are expected to increase the most by 2024.

- **Specializations.**
  Coeur d'Alene's occupational specializations (greater than the U.S. average) include:
    - Construction (1.48)
    - Healthcare Support (1.27)
    - Food Preparation (1.22)
    - Sales (1.12)
    - Office and Administration (1.12)
    - Health Practitioners (1.09)
    - Building and Grounds Keeping (1.04)
    - Installation and Repair (1.04)

TAKEAWAYS
(Continued)

- **Employment by 2024.**
  Looking to 2024, Coeur d'Alene regional employment base, including those who are self-employed, will top more than 77,400, an increase of 7.7% over 2019. This will represent approximately 5,550 new jobs.

- **Construction.**
  Coeur d'Alene's workforce with construction skills has increased (31%) the most of all occupational sectors from 2014 to 2019. This sector also represents the greatest skill specialization for the region — 48% larger than the U.S. average (for a community its size).

- **Science Expertise.**
  Coeur d'Alene's science occupational cluster is the most specialized knowledge sector for the county — 19% more concentrated than the U.S. average – and the second fastest growing sector. However, it employs less than 1,000 workers.

- **Healthcare Skills.**
  With approximately 4,300 workers, the region boasts a specialization for healthcare practitioners that is 9% greater than the U.S. average. Likewise, the Coeur d'Alene's healthcare support cluster is 27% larger than the U.S. average, employing 2,450 workers. Both skill clusters also represent two fast-growing sectors for the region.

KOOTENAI COUNTY/ COEUR D'ALENE MSA

Occupational Cluster: LQ, 2019

Occupational Cluster	LQ
Construction and Extraction	1.48
Healthcare Support	1.27
Food Preparation and Serving Related	1.22
Life, Physical, and Social Science	1.19
Sales and Related	1.12
Office and Administrative Support	1.12
Healthcare Practitioners and Technical	1.09
Building and Grounds Cleaning and…	1.04
Installation, Maintenance, and Repair	1.04
Community and Social Service	1.00
Personal Care and Service	1.00
Management	0.98
Production	0.95
Education, Training, and Library	0.86
Protective Service	0.82
Legal	0.79
Arts, Design, Entertainment, Sports,…	0.79
Architecture and Engineering	0.75
Business and Financial Operations	0.68
Farming, Fishing, and Forestry	0.65
Transportation and Material Moving	0.64
Computer and Mathematical	0.48

U.S. Average = 1.0

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

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COEUR D'ALENE MSA

Occupational Cluster: Employment, 2019

Occupational Cluster	Employment
Office and Administrative Support	11,419
Sales and Related	7,885
Food Preparation and Serving…	7,424
Construction and Extraction	4,985
Healthcare Practitioners and…	4,326
Management	4,117
Production	3,969
Education, Training, and Library	3,441
Personal Care and Service	3,361
Transportation and Material Moving	3,160
Installation, Maintenance, and…	2,891
Building and Grounds Cleaning…	2,748
Business and Financial Operations	2,539
Healthcare Support	2,449
Protective Service	1,363
Community and Social Service	1,278
Arts, Design, Entertainment,…	1,047
Computer and Mathematical	1,007
Architecture and Engineering	916
Life, Physical, and Social Science	708
Legal	473
Farming, Fishing, and Forestry	373

Total Employment: 71,878

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County and blue sharing indicates LQ over 1.00

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COEUR D'ALENE MSA

Occupational Cluster: Share of Employment (%), 2019

Occupation	Share
Office and Administrative Support	15.8%
Sales and Related	10.9%
Food Preparation and Serving…	10.3%
Construction and Extraction	6.9%
Healthcare Practitioners and…	6.0%
Management	5.7%
Production	5.5%
Education, Training, and Library	4.8%
Personal Care and Service	4.7%
Transportation and Material Moving	4.4%
Installation, Maintenance, and…	4.0%
Building and Grounds Cleaning…	3.8%
Business and Financial Operations	3.5%
Healthcare Support	3.4%
Protective Service	1.9%
Community and Social Service	1.8%
Arts, Design, Entertainment,…	1.5%
Computer and Mathematical	1.4%
Architecture and Engineering	1.3%
Life, Physical, and Social Science	1.0%
Legal	0.7%
Farming, Fishing, and Forestry	0.5%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Occupational Cluster: 5-Year Employment Growth, 2014- 2019

Occupational Cluster	Growth
Construction and Extraction	30.8%
Healthcare Practitioners and…	23.8%
Food Preparation and Serving…	22.5%
Life, Physical, and Social Science	22.5%
Business and Financial Operations	22.1%
Management	21.9%
Computer and Mathematical	21.4%
Installation, Maintenance, and…	21.1%
Legal	18.9%
Personal Care and Service	18.7%
Arts, Design, Entertainment,…	18.1%
Education, Training, and Library	17.0%
Architecture and Engineering	16.1%
Healthcare Support	15.5%
Transportation and Material Moving	14.7%
Farming, Fishing, and Forestry	14.5%
Office and Administrative Support	12.8%
Sales and Related	8.5%
Community and Social Service	8.3%
Building and Grounds Cleaning…	8.0%
Protective Service	5.4%
Production	3.3%

All Occupations: 16.0%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Occupational Cluster: 5-Year Employment Growth (New Jobs), 2014-2019

Occupational Cluster	New Jobs
Food Preparation and Serving...	1,362
Office and Administrative Support	1,298
Construction and Extraction	1,175
Healthcare Practitioners and...	830
Management	740
Sales and Related	620
Personal Care and Service	530
Installation, Maintenance, and...	504
Education, Training, and Library	500
Business and Financial Operations	460
Transportation and Material Moving	404
Healthcare Support	328
Building and Grounds Cleaning...	203
Computer and Mathematical	177
Arts, Design, Entertainment,...	161
Life, Physical, and Social Science	130
Production	128
Architecture and Engineering	127
Community and Social Service	98
Legal	75
Protective Service	69
Farming, Fishing, and Forestry	47

Total New Jobs: 9,996

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Occupational Cluster: 5-Year Employment Projection, 2019-2024

Occupational Cluster	Projection
Healthcare Support	15.7%
Healthcare Practitioners and Technical	13.1%
Computer and Mathematical	12.2%
Business and Financial Operations	10.9%
Education, Training, and Library	9.0%
Food Preparation and Serving Related	8.4%
Installation, Maintenance, and Repair	8.2%
Management	8.0%
Personal Care and Service	8.0%
Life, Physical, and Social Science	8.0%
Transportation and Material Moving	7.9%
Architecture and Engineering	7.8%
Construction and Extraction	7.3%
Arts, Design, Entertainment, Sports, and Media	7.1%
Building and Grounds Cleaning and Maintenance	6.8%
Office and Administrative Support	6.3%
Legal	6.2%
Community and Social Service	5.9%
Sales and Related	5.9%
Production	2.6%
Protective Service	2.6%
Farming, Fishing, and Forestry	-2.0%

All Occupations: 7.7%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

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COEUR D'ALENE MSA

Occupational Cluster: 5-Year Employment Projection (New Jobs), 2019-2024

Occupational Cluster	New Jobs
Office and Administrative Support	717
Food Preparation and Serving Related	624
Healthcare Practitioners and Technical	567
Sales and Related	463
Healthcare Support	384
Construction and Extraction	364
Management	331
Education, Training, and Library	308
Business and Financial Operations	277
Personal Care and Service	270
Transportation and Material Moving	250
Installation, Maintenance, and Repair	238
Building and Grounds Cleaning and Maintenance	187
Computer and Mathematical	122
Production	105
Community and Social Service	76
Arts, Design, Entertainment, Sports, and Media	75
Architecture and Engineering	71
Life, Physical, and Social Science	56
Protective Service	36
Legal	29
Farming, Fishing, and Forestry	-7

Total New Jobs: 5,543

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

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COEUR D'ALENE MSA

Occupational Cluster: Projected Employment, 2024

Occupational Cluster	Employment
Office and Administrative Support	12,135
Sales and Related	8,348
Food Preparation and Serving…	8,049
Construction and Extraction	5,349
Healthcare Practitioners and…	4,893
Management	4,447
Production	4,074
Education, Training, and Library	3,750
Personal Care and Service	3,631
Transportation and Material Moving	3,409
Installation, Maintenance, and…	3,129
Building and Grounds Cleaning…	2,935
Healthcare Support	2,832
Business and Financial Operations	2,816
Protective Service	1,399
Community and Social Service	1,354
Computer and Mathematical	1,129
Arts, Design, Entertainment,…	1,121
Architecture and Engineering	987
Life, Physical, and Social Science	764
Legal	503
Farming, Fishing, and Forestry	365

Total Employment: 77,421

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Occupational Cluster: Projected Share of Employment, 2024

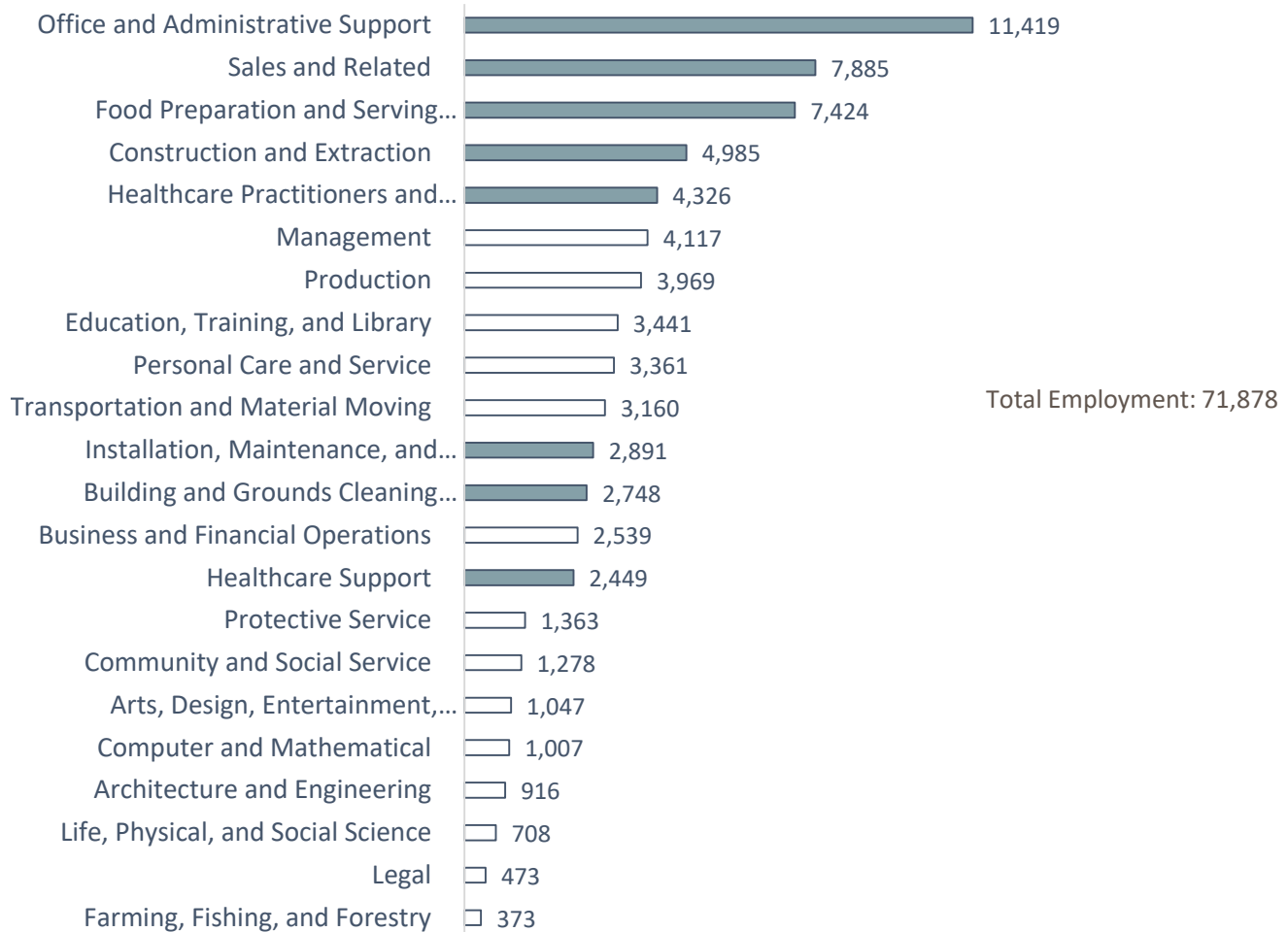| Occupational Cluster	Share
Office and Administrative Support	15.6%
Sales and Related	10.7%
Food Preparation and Serving…	10.4%
Construction and Extraction	6.9%
Healthcare Practitioners and…	6.3%
Management	5.7%
Production	5.2%
Education, Training, and Library	4.8%
Personal Care and Service	4.7%
Transportation and Material Moving	4.4%
Installation, Maintenance, and…	4.0%
Building and Grounds Cleaning…	3.8%
Healthcare Support	3.6%
Business and Financial Operations	3.6%
Protective Service	1.8%
Community and Social Service	1.7%
Computer and Mathematical	1.4%
Arts, Design, Entertainment,…	1.5%
Architecture and Engineering	1.3%
Life, Physical, and Social Science	1.0%
Legal	0.6%
Farming, Fishing, and Forestry	0.5%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County
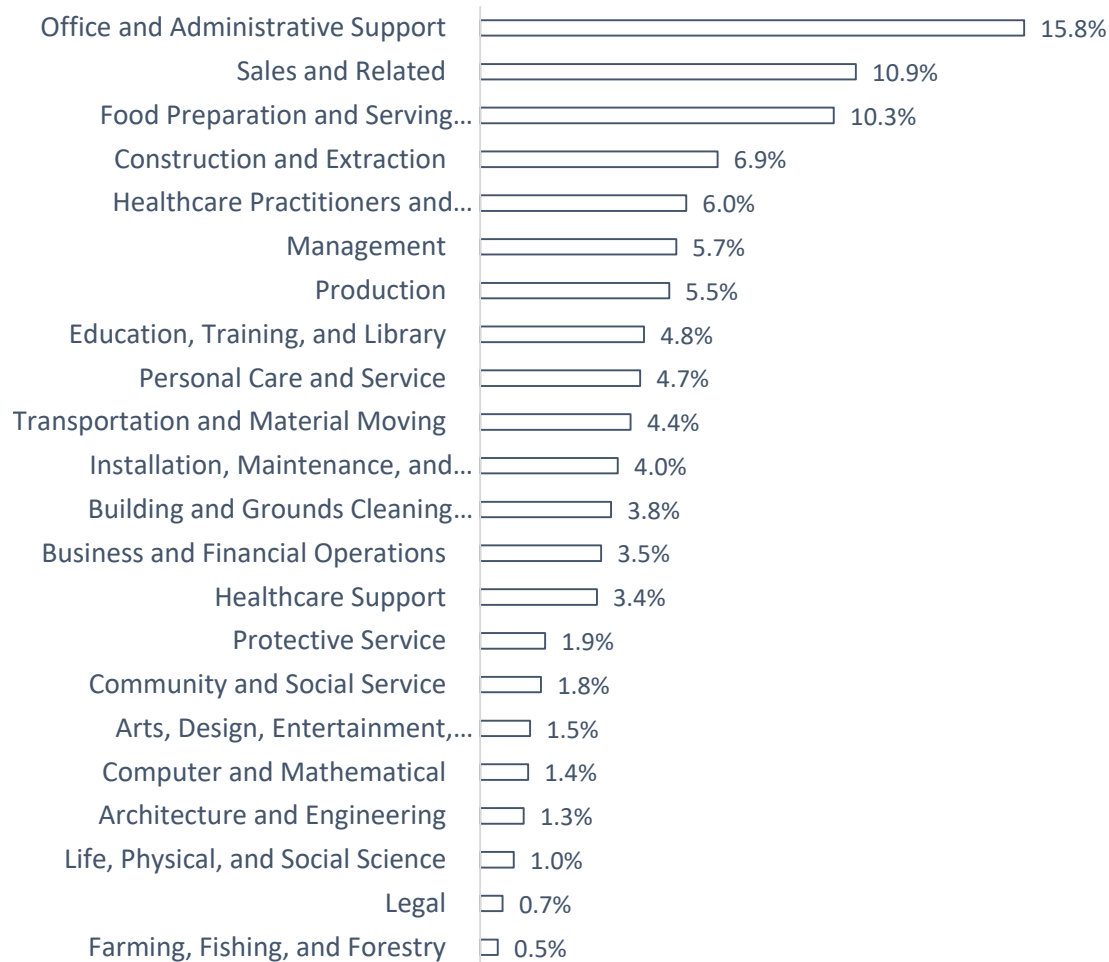
COEUR D'ALENE MSA

Occupational Cluster: Average Annual Salary, 2019

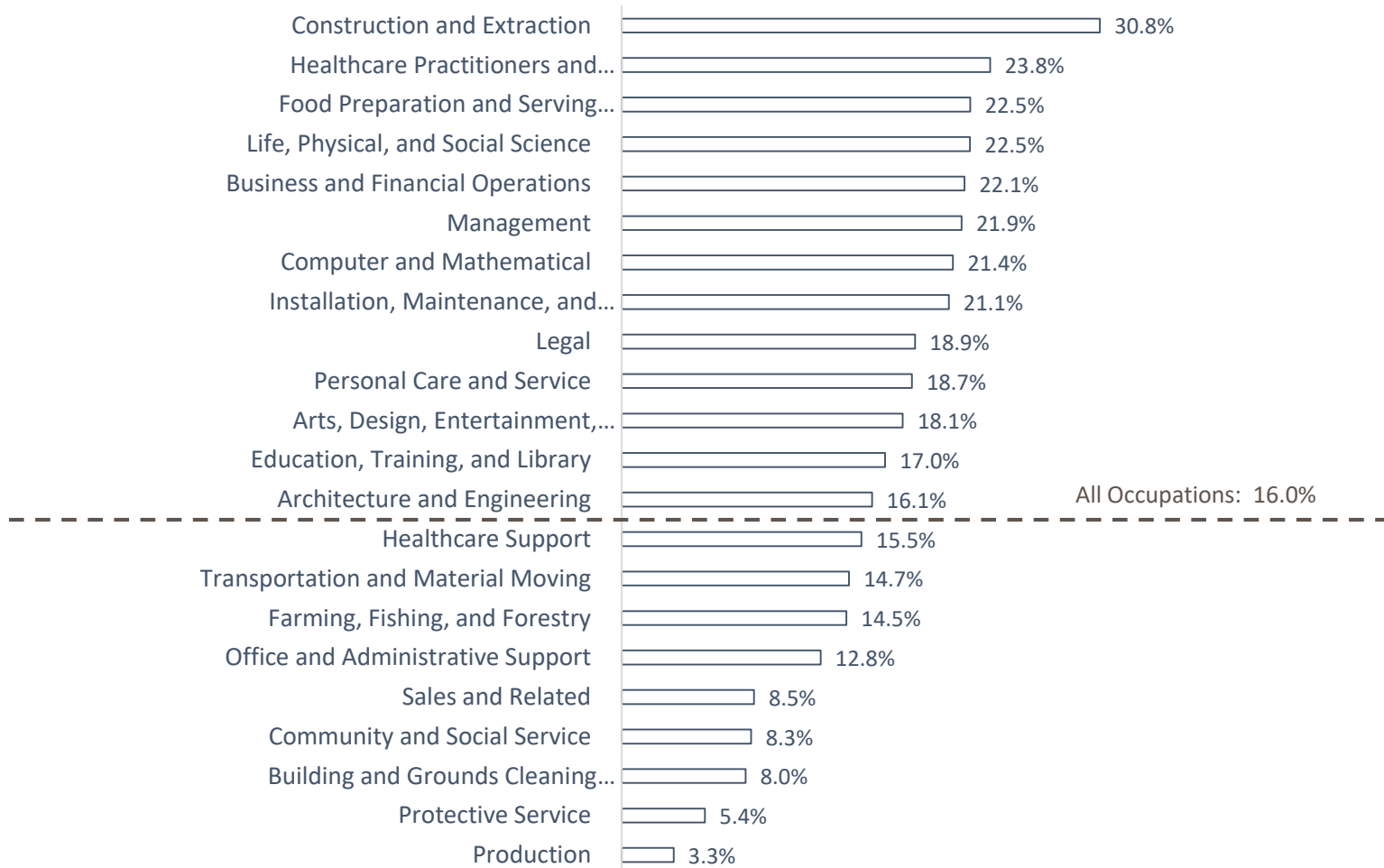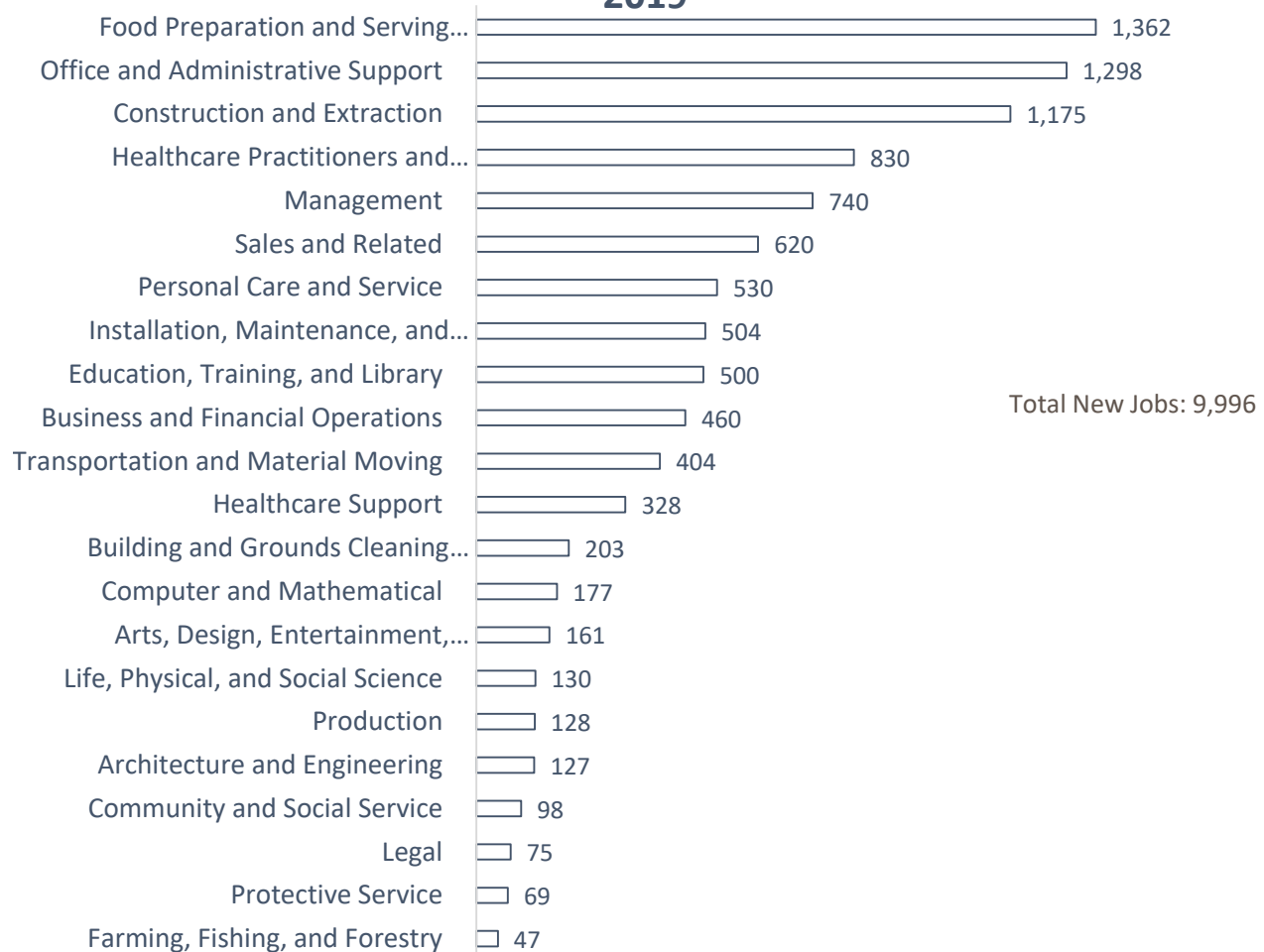| Occupational Cluster	Average Annual Salary
Legal	$89,005
Healthcare Practitioners and…	$74,156
Management	$64,971
Architecture and Engineering	$64,461
Computer and Mathematical	$61,217
Business and Financial Operations	$55,628
Life, Physical, and Social Science	$48,711
Protective Service	$47,844
Community and Social Service	$42,354
Construction and Extraction	$40,386
Installation, Maintenance, and…	$39,220
Farming, Fishing, and Forestry	$35,790
Arts, Design, Entertainment,…	$32,469
Transportation and Material Moving	$32,432
Office and Administrative Support	$32,320
Healthcare Support	$31,681
Education, Training, and Library	$31,293
Production	$30,819
Sales and Related	$27,616
Building and Grounds Cleaning…	$25,392
Personal Care and Service	$23,400
Food Preparation and Serving…	$20,956

All Occupations: $37,689

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

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COEUR D'ALENE MSA

Top 5 Occupational Clusters: LQ

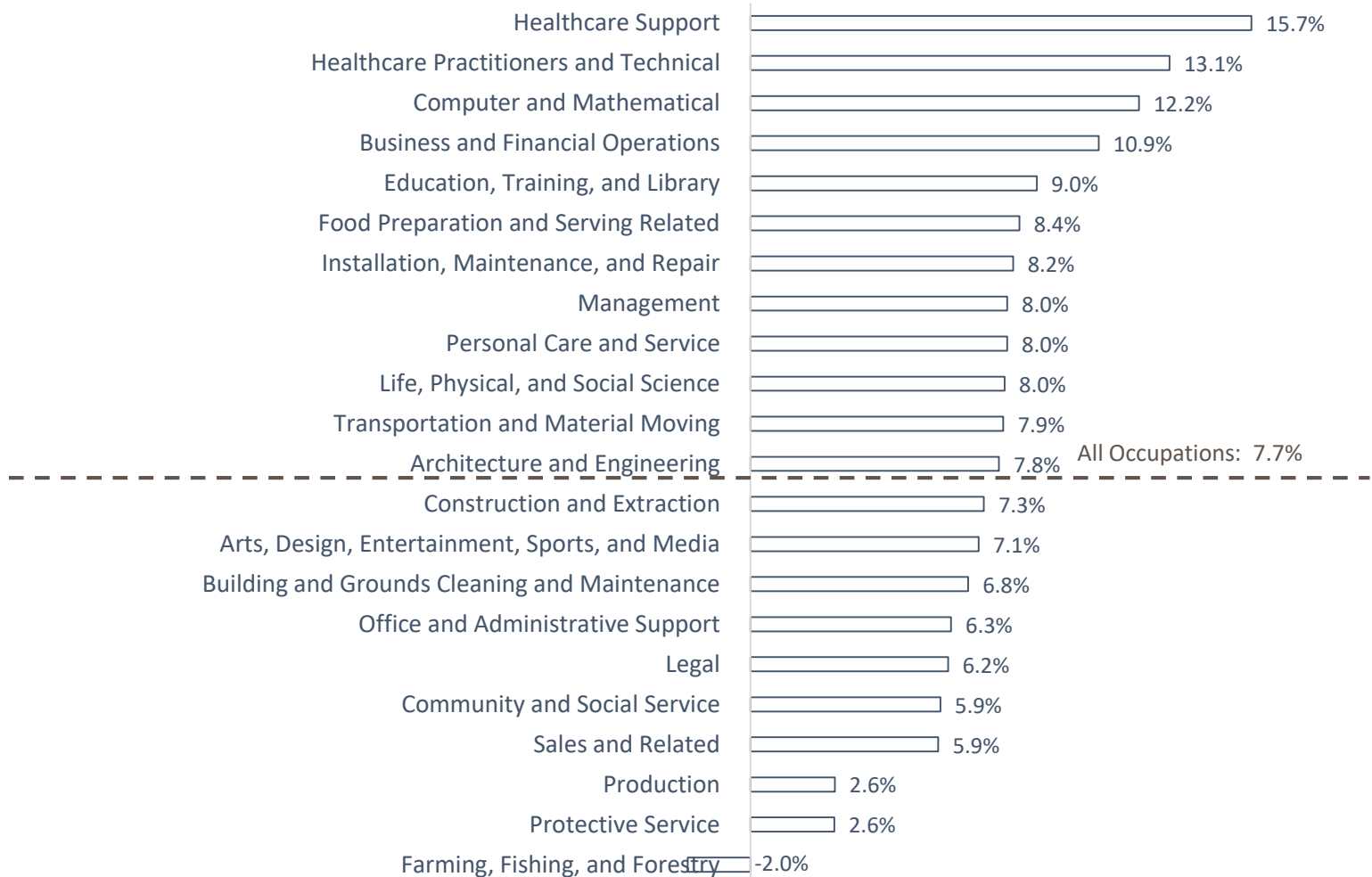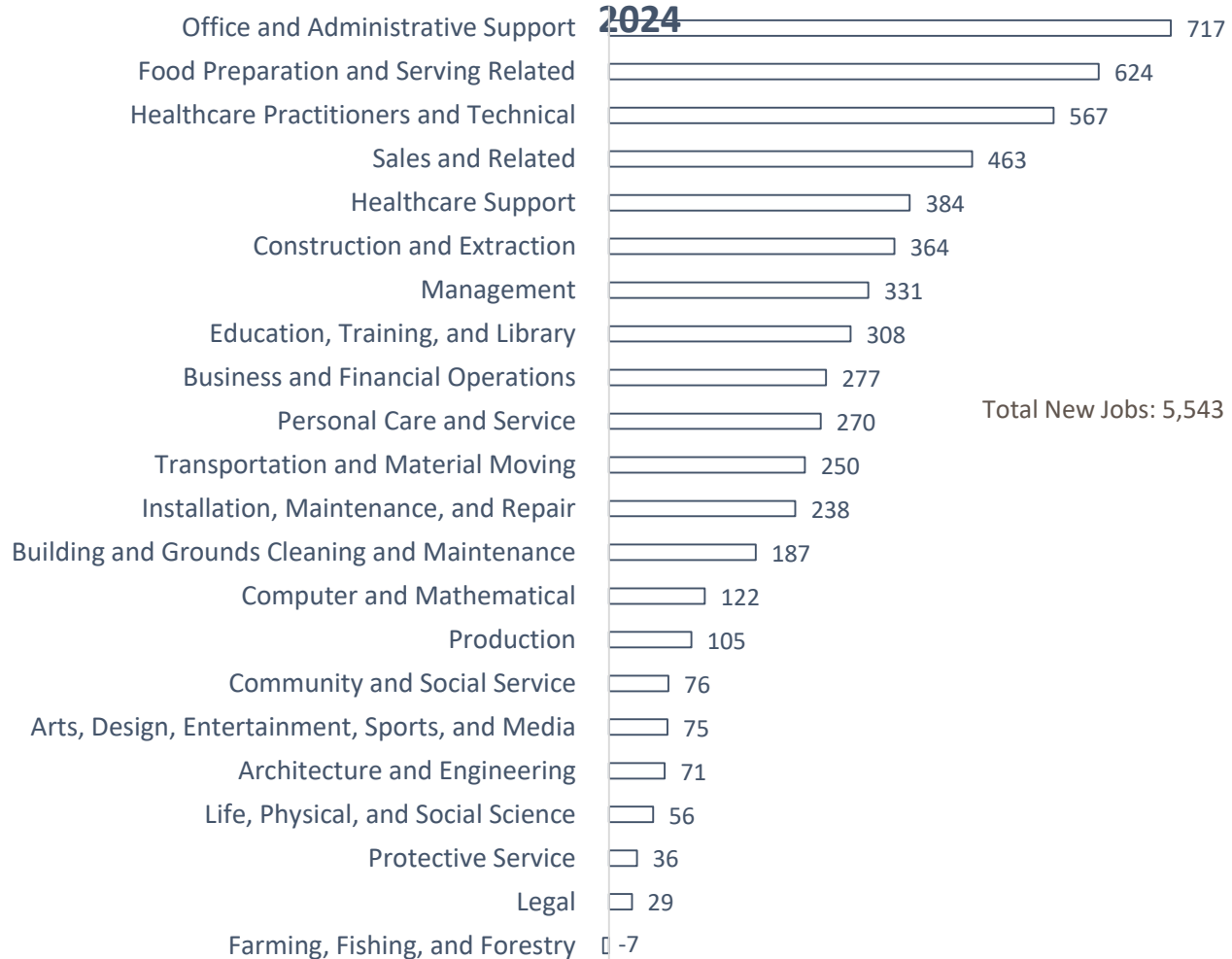| Rank	Cluster	LQ	Share of Employment (%)	5-Year Growth, 2014-2019	Average Annual Salary
1	Construction and Extraction	1.48	6.9%	30.8%	$40,386
2	Healthcare Support	1.27	3.4%	15.5%	$31,681
3	Food Preparation and Serving Related	1.22	10.3%	22.5%	$20,956
4	Life, Physical, and Social Science	1.19	1.0%	22.5%	$48,711
5	Sales and Related	1.12	10.9%	8.5%	$27,616

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Top 5 Occupational Clusters: Total Employment

Rank	Cluster	Total Employment	Share of Employment (%)	LQ	Average Annual Salary
1	Office and Administrative Support	11,419	15.8%	1.07	$32,320
2	Sales and Related	7,885	10.9%	1.14	$27,616
3	Food Preparation and Serving Related	7,424	10.3%	1.19	$20,956
4	Construction and Extraction	4,985	6.9%	1.38	$40,386
5	Healthcare Practitioners and Technical	4,326	6.0%	1.04	$74,156

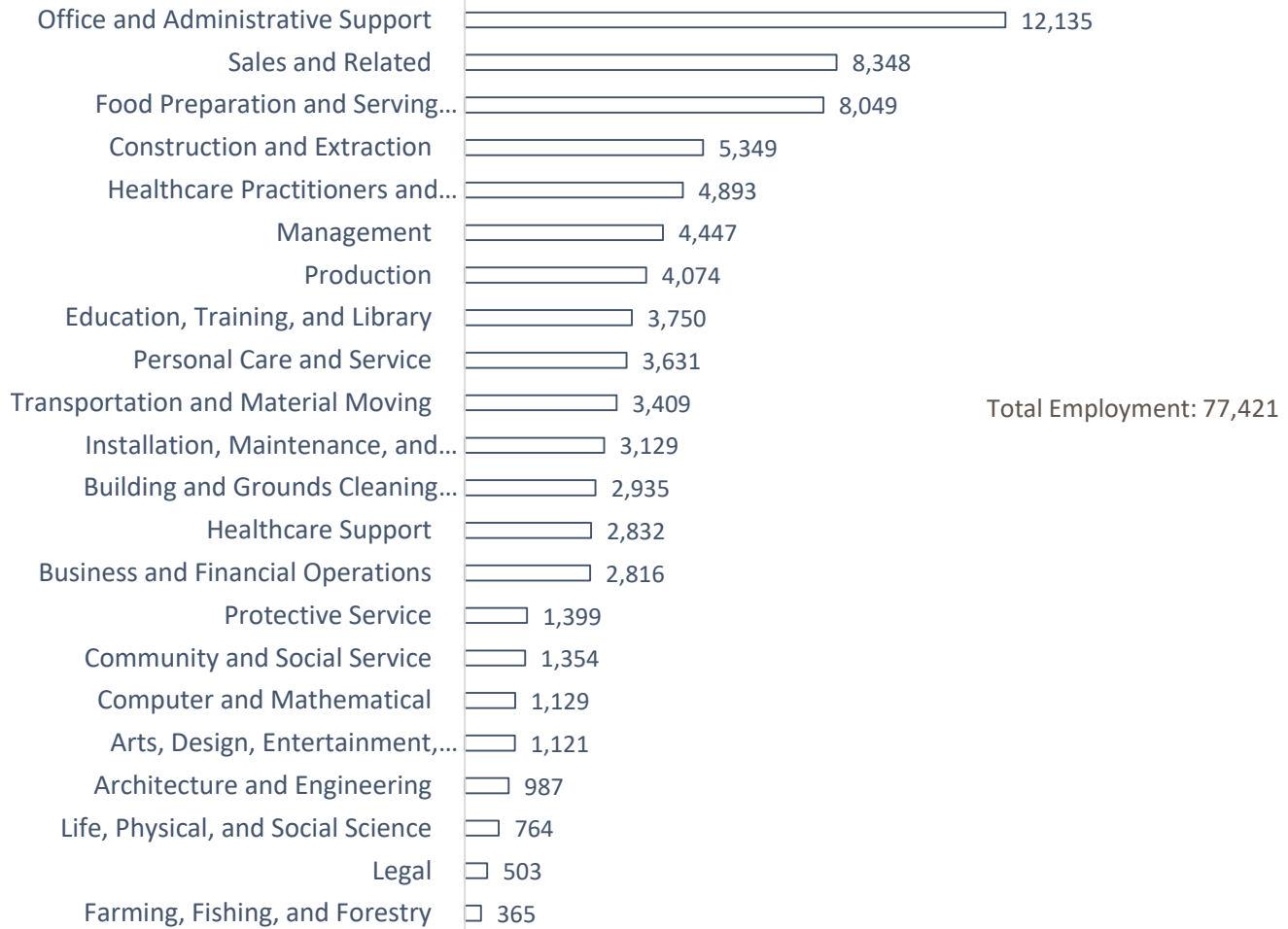Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Top 5 Occupational Clusters: 5-Year Employment Growth, 2014-2019

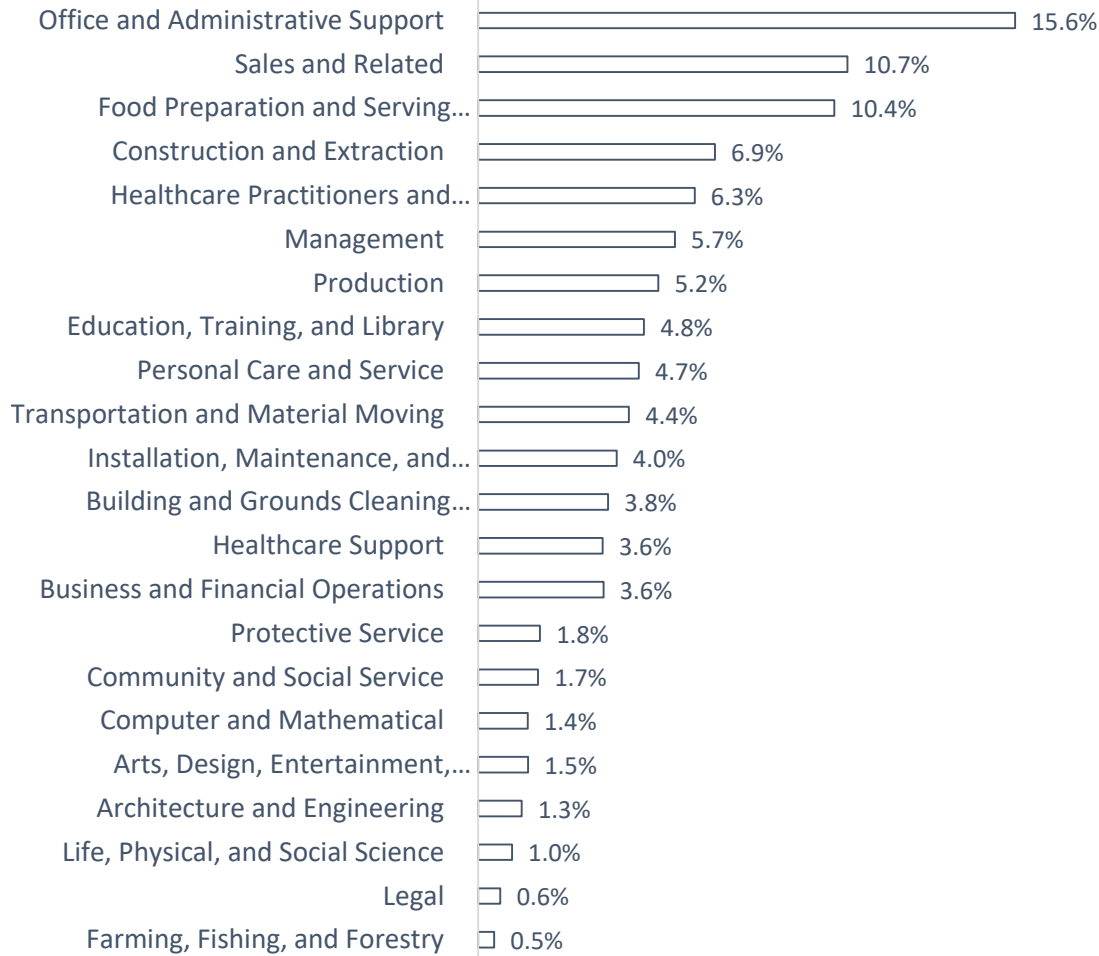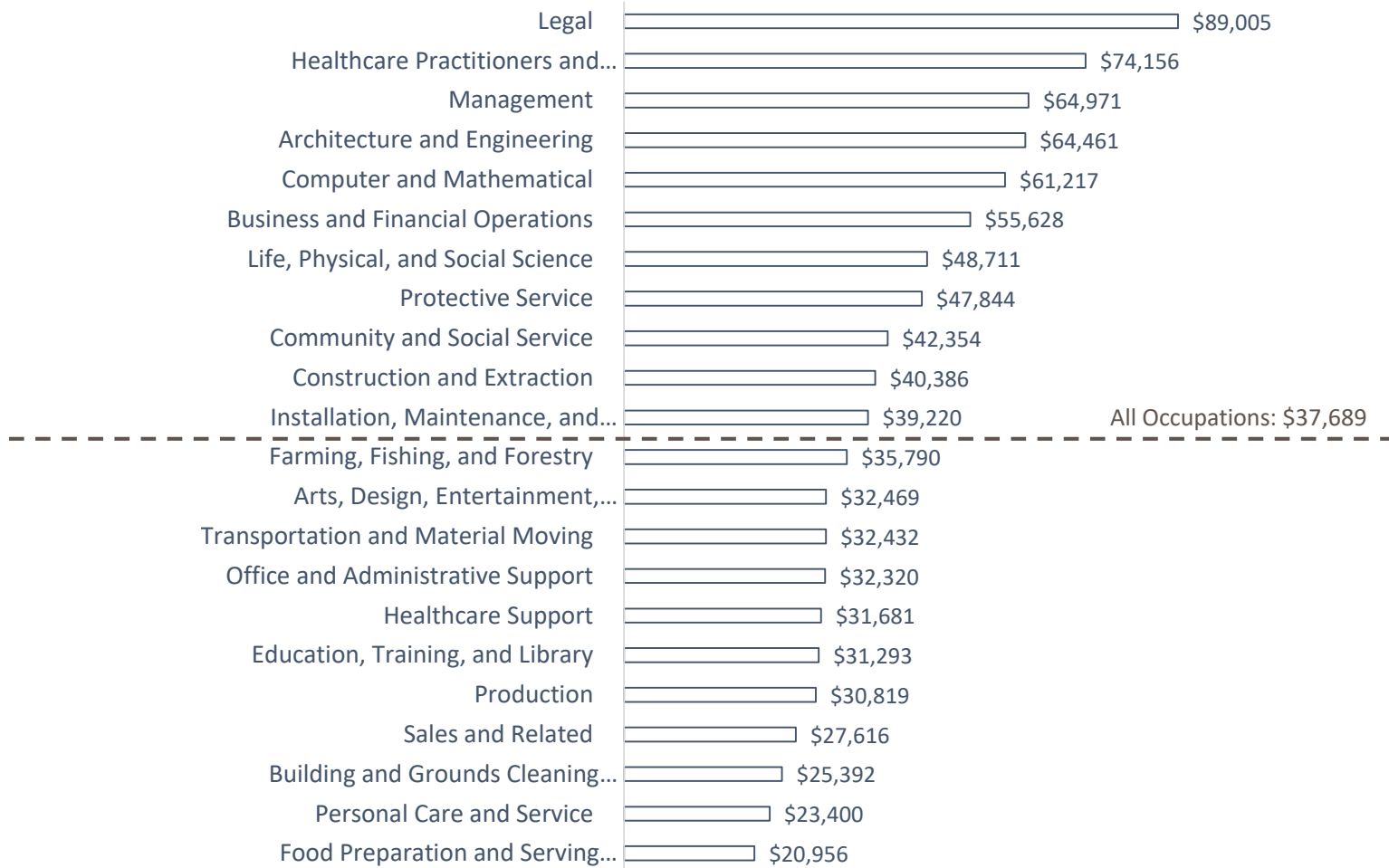| Rank	Cluster	5-Year Growth	Share of Employment (%)	LQ	Average Annual Salary
1	Construction and Extraction	30.8%	6.9%	1.48	$40,386
2	Healthcare Practitioners and Technical	23.8%	6.3%	1.09	$74,156
3	Food Preparation and Serving Related	22.5%	10.4%	1.22	$20,956
4	Life, Physical, and Social Science	22.5%	1.0%	1.19	$48,711
5	Business and Financial Operations	22.1%	3.6%	0.68	$55,628

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Top 5 Occupational Clusters: 5-Year Employment Projection, 2014-2019

Rank	Cluster	5-Year Projection, 2019-2024	2024 Employment	Share of 2024 Employment	LQ
1	Healthcare Support	15.7%	2,832	3.6%	1.27
2	Healthcare Practitioners and Technical	13.1%	4,893	6.3%	1.09
3	Computer and Mathematical	12.2%	1,129	1.5%	0.48
4	Business and Financial Operations	10.9%	2,816	3.6%	0.68
5	Education, Training, and Library	9.0%	3,750	4.8%	0.86

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Top 5 Occupational Clusters: Average Annual Cluster

Rank	Cluster	Average Annual Salary	LQ	Share of Employment	5-Year Growth, 2014-2019
1	Legal	$89,005	0.79	0.7%	18.9%
2	Healthcare Practitioners and Technical	$74,156	1.09	6.0%	23.8%
3	Management	$64,971	0.98	5.7%	21.9%
4	Architecture and Engineering	$64,461	0.75	1.3%	16.1%
5	Computer and Mathematical	$61,217	0.48	1.4%	21.4%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Service Sector	1.12	35,178	48.8%	13.9%	7.30%	$28,936
Working Sector	1.07	17,753	24.6%	15.7%	6.4%	$34,320
Knowledge Sector	0.89	18,574	25.7%	20.8%	9.8%	$57,526

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Sector

LQ (U.S. Average = 1.0)

5-Year Employment Growth, 2014-2019

COEUR D'ALENE MSA

Knowledge Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Life, Physical, and Social Science	1.19	708	1.0%	22.5%	8.0%	$48,711
Healthcare Practitioners and Technical	1.09	4,326	6.0%	23.8%	13.1%	$74,156
Management	0.98	4,117	5.7%	21.9%	8.0%	$64,971
Education, Training, and Library	0.86	3,441	4.8%	17.0%	9.0%	$31,293
Legal	0.79	473	0.7%	18.9%	6.2%	$89,005
Arts, Design, Entertainment, Sports, and Media	0.79	1,047	1.5%	18.1%	7.1%	$32,469
Architecture and Engineering	0.75	916	1.3%	16.1%	7.8%	$64,461
Business and Financial Operations	0.68	2,539	3.5%	22.1%	10.9%	$55,628
Computer and Mathematical	0.48	1,007	1.4%	21.4%	12.2%	$61,217
Knowledge Sector	**0.89**	**18,574**	**25.7%**	**20.80%**	**9.80%**	**$57,526**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

COEUR D'ALENE MSA

Knowledge Sector

LQ (U.S. Average = 1.0)

5-Year Employment Growth, 2014-2019

Science

Healthcare Practitioners

Education and Training

Management

Legal

Arts, Design, Entertainment, Sports, and Media

Architecture and Engineering

Business and Financial

Computer and Math

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Note: Coeur d'Alene is defined as Kootenai County

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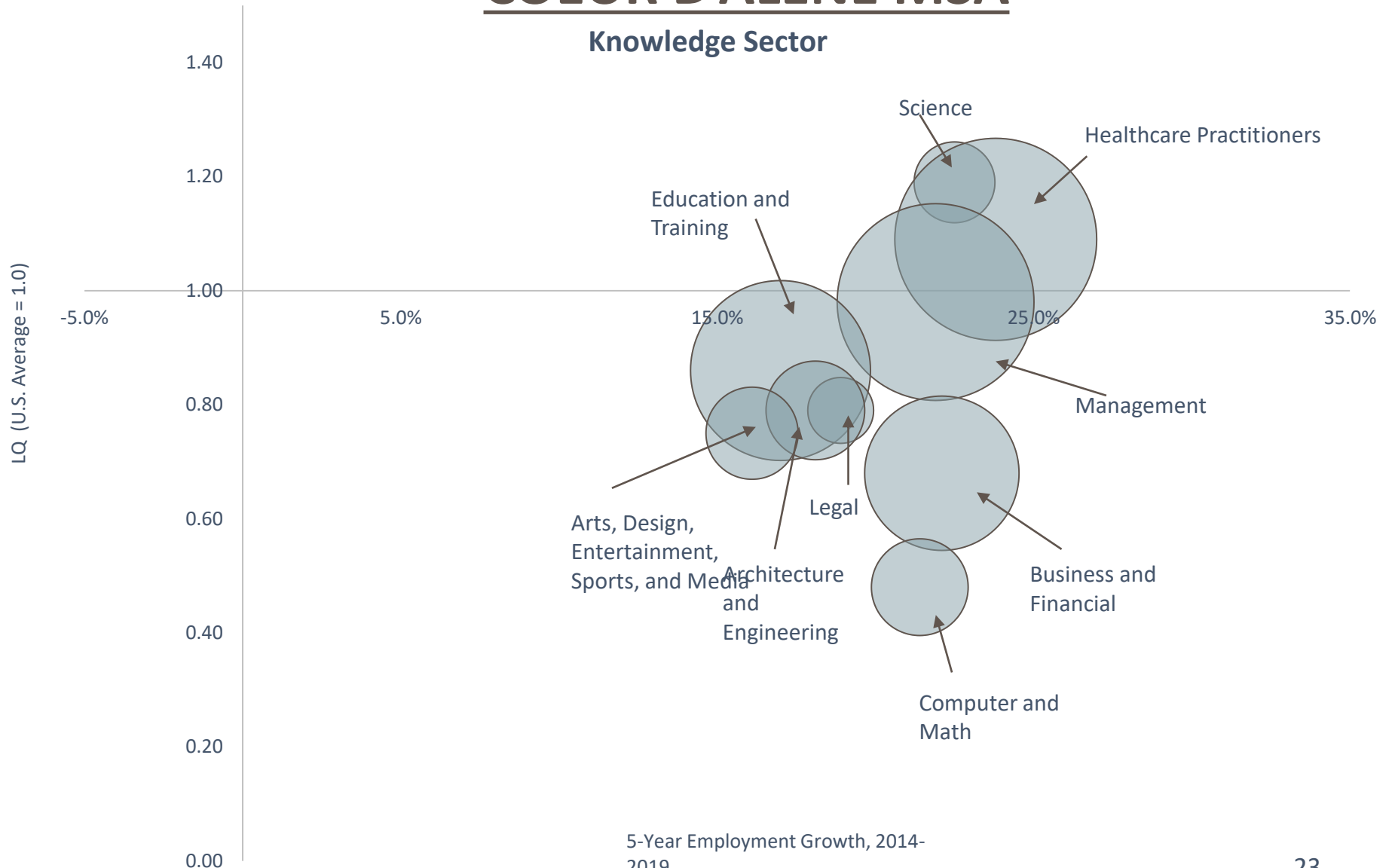
COEUR D'ALENE MSA

Service Sector

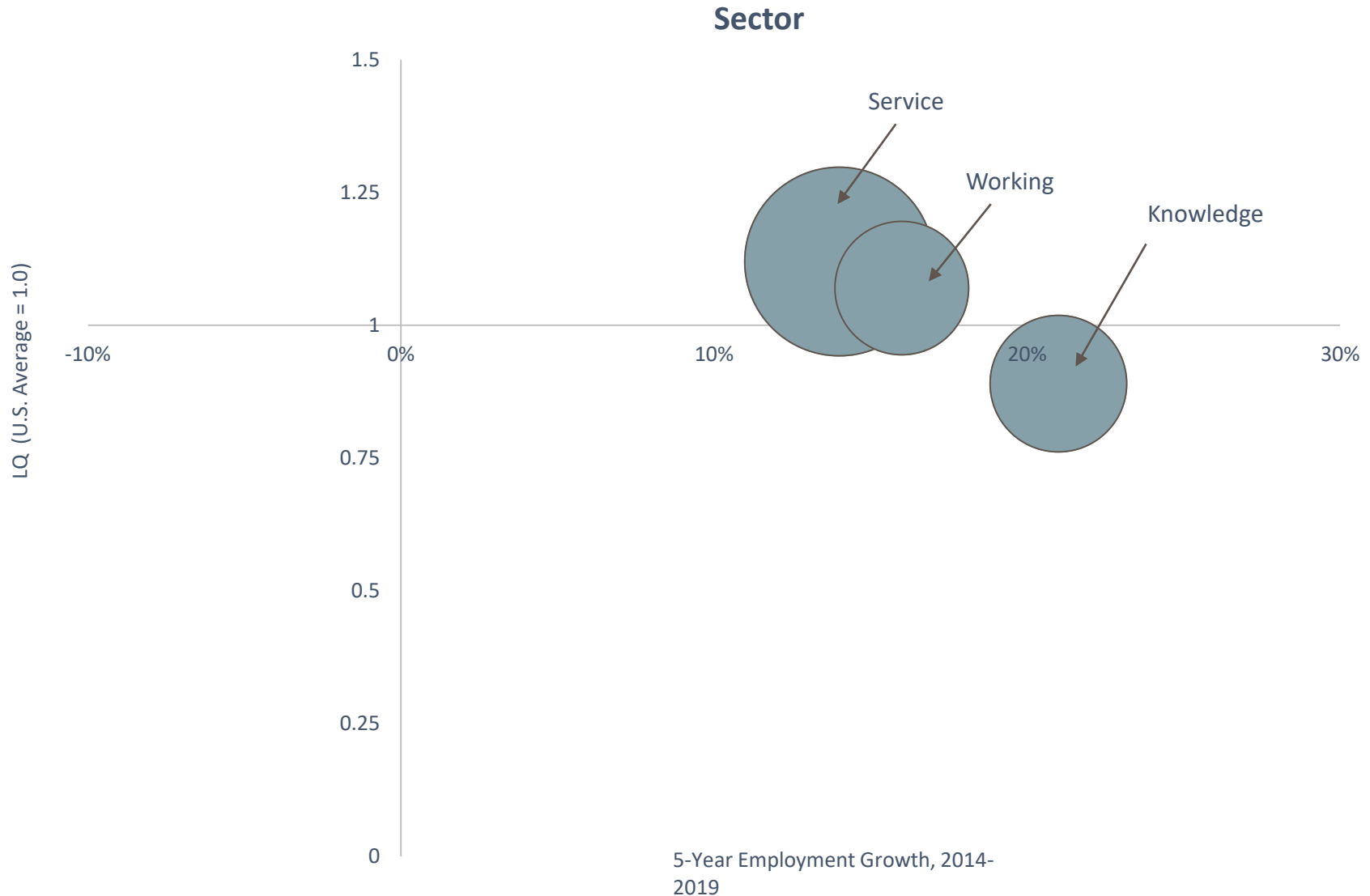| Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Healthcare Support	1.27	2,449	3.4%	15.5%	15.7%	$31,681
Food Preparation and Serving Related	1.22	7,424	10.3%	22.5%	8.4%	$20,956
Sales and Related	1.12	7,885	10.9%	8.5%	5.9%	$27,616
Office and Administrative Support	1.12	11,419	15.8%	12.8%	6.3%	$32,320
Community and Social Service	1.00	1,278	1.8%	8.3%	5.9%	$42,354
Personal Care and Service	1.00	3,361	4.7%	18.7%	8.0%	$23,400
Protective Service	0.82	1,363	1.9%	5.4%	2.6%	$47,844
Service Sector	**1.12**	**35,178**	**48.8%**	**13.9%**	**7.30%**	**$28,936**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

Size of Bubble = Total Employment

COEUR D'ALENE MSA
Service Sector

Food Preparation

Healthcare Support

Sales

Community and Social Service

Office and Administration

Personal Service

Protective Service

LQ (U.S. Average = 1.0)

1.40

1.20

1.00

0.80

0.60

0.40

0.20

0.00

-5.0%   5.0%   15.0%   25.0%   35.0%
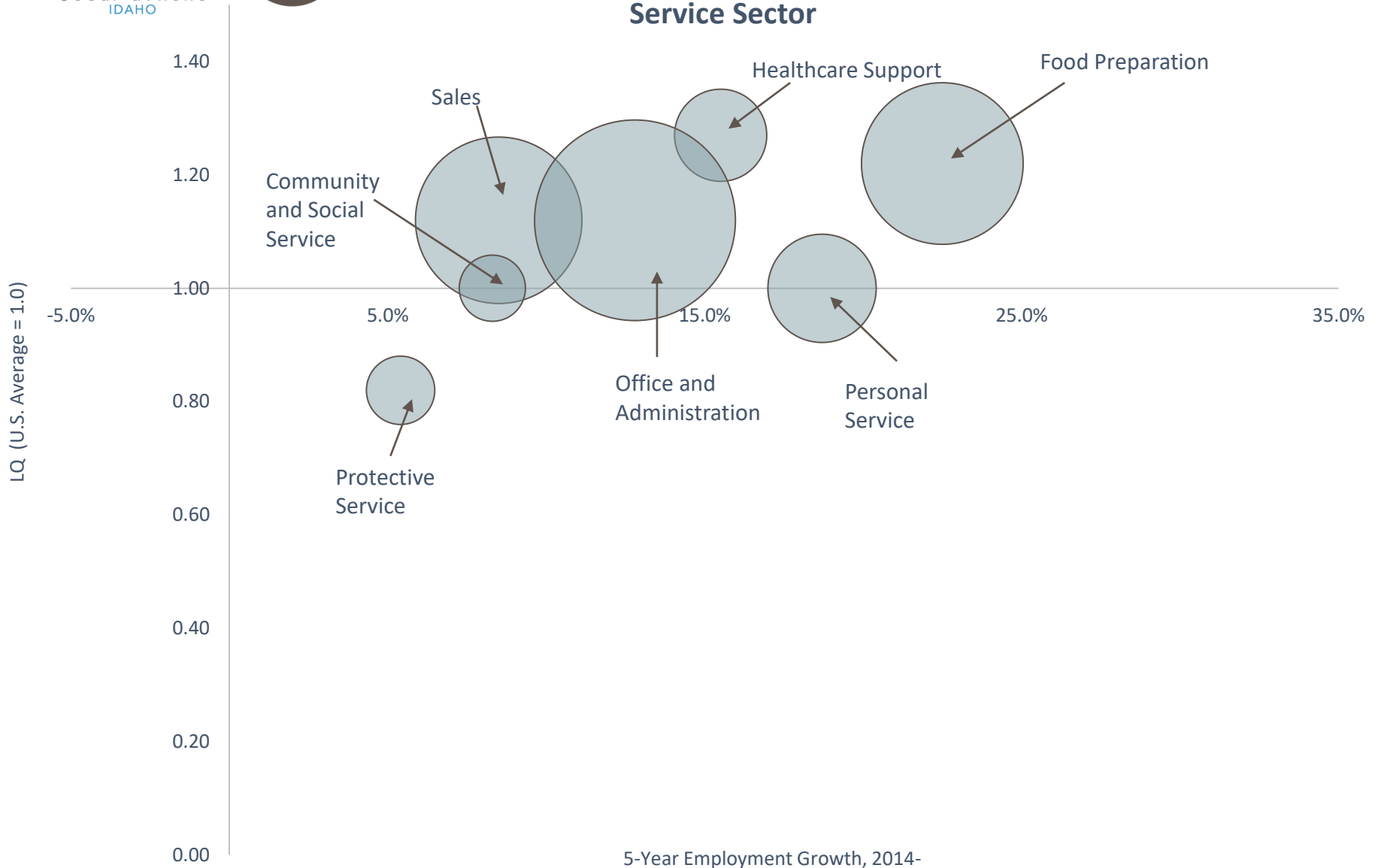
5-Year Employment Growth, 2014-2019

COEUR D'ALENE MSA

Working Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Construction and Extraction	1.48	4,985	6.9%	30.8%	7.3%	$40,386
Building and Grounds Cleaning and Maintenance	1.04	2,748	3.8%	8.0%	6.8%	$25,392
Installation, Maintenance, and Repair	1.04	2,891	4.0%	21.1%	8.2%	$39,220
Production	0.95	3,969	5.5%	3.3%	2.6%	$30,819
Transportation and Material Moving	0.64	3,160	4.4%	14.7%	7.9%	$32,432
Working Sector	**1.07**	**17,753**	**24.6%**	**15.7%**	**6.4%**	**$34,320**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

Size of Bubble = Total Employment

COEUR D'ALENE MSA

Working Sector
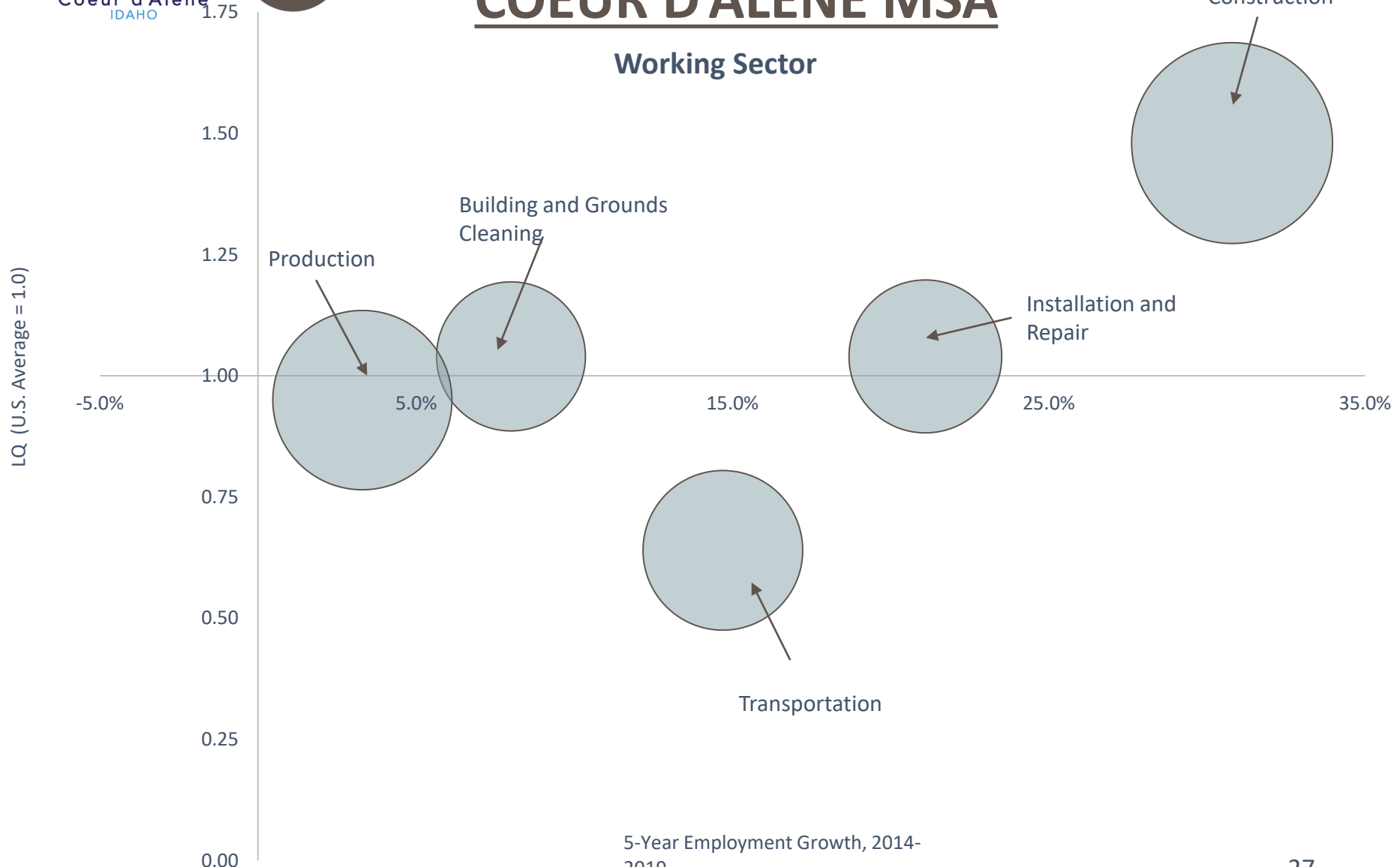
LQ (U.S. Average = 1.0)

Construction

Building and Grounds Cleaning

Production

Installation and Repair

Transportation

5-Year Employment Growth, 2014-2019

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Coeur d'Alene is defined as Kootenai County

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Spokane MSA

- **Service Sector.**
Approximately 125,000 Spokane workers have skills associated with the service sector — a 7.5% increase over 2014. This represents a cluster that is 6% larger than the U.S. average.

- **Working Sector.**
An estimated 67,000 Spokane workers have working sector (blue-collar) skills, including those in construction, transportation, and production, representing 25% of the workforce. Spokane's working sector was the fastest growing segment of the workforce (13.6%) from 2014 to 2019.

- **Knowledge Sector.**
Spokane's knowledge sector is 6% smaller than the U.S. average, employing 77,000 residents. Looking out to 2024, the sector is expected to increase by 7% and represent the fastest growing skill sector in the region.

- **Specializations.**
Spokane's occupational specializations include:
  - Community and Social Science (1.47)
  - Healthcare Support (1.13)
  - Agriculture and Forestry (1.13)
  - Personal Services (1.13)
  - Building and Grounds Maintenance (1.12)
  - Construction (1.11)
  - Healthcare Practitioners (1.07)
  - Installation (1.06)
  - Arts, Design, and Media (1.05)
  - Office and Administration (1.04)
  - Protective Services (1.04)
  - Sales (1.02)

TAKEAWAYS

(Continued)

- **Employment by 2024.**
  Looking to 2024, Spokane's employment base will top more than 288,200, an increase of 6.5% over 2019. This will represent approximately 17,669 new jobs. In the future.

- **Agriculture.**
  Spokane's farming and forestry sector represents one of the occupational clusters with the highest specialization for the region – 13% above the national average. It is also the fastest-growing cluster for the metro areas as well (97%). The sector employs approximately 2,000 workers.

- **Limited Knowledge Cluster Specializations.**
  Spokane has just two Knowledge Sector skill clusters (Arts, Design and Media; and Healthcare Practitioners) with a locational quotient above 1.0 (the U.S. average).

- **Healthcare-Related Skills.**
  More than 31,300 residents have skills aligned with healthcare and social services: healthcare practitioners, healthcare support, and community and social services. This represents 12% of regional employment, and each of these three sectors are more specialized than the U.S. average.

- **Construction.**
  Spokane's construction skill cluster has increased 25% from 2014 to 2019, representing the largest increase in new jobs (2,760).

SPOKANE MSA

Occupational Cluster: LQ, 2019

Occupation	LQ
Community and Social Service	1.47
Healthcare Support	1.13
Farming, Fishing, and Forestry	1.13
Personal Care and Service	1.13
Building and Grounds Cleaning…	1.12
Construction and Extraction	1.11
Healthcare Practitioners and…	1.07
Installation, Maintenance, and…	1.06
Arts, Design, Entertainment,…	1.05
Office and Administrative Support	1.04
Protective Service	1.04
Sales and Related	1.02
Education, Training, and Library	0.99
Business and Financial Operations	0.96
Life, Physical, and Social Science	0.96
Food Preparation and Serving…	0.94
Transportation and Material Moving	0.90
Production	0.88
Management	0.82
Legal	0.81
Architecture and Engineering	0.73
Computer and Mathematical	0.71

U.S. Average = 1.0

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

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SPOKANE MSA

Occupational Cluster: Employment, 2019

Occupation	Employment
Office and Administrative Support	40,627
Sales and Related	27,104
Food Preparation and Serving…	21,944
Transportation and Material Moving	16,815
Healthcare Practitioners and…	16,248
Education, Training, and Library	15,213
Personal Care and Service	14,112
Business and Financial Operations	13,982
Production	13,839
Construction and Extraction	13,783
Management	12,804
Installation, Maintenance, and…	11,239
Building and Grounds Cleaning…	11,026
Healthcare Support	8,463
Community and Social Service	6,622
Protective Service	6,177
Computer and Mathematical	5,863
Arts, Design, Entertainment,…	5,360
Architecture and Engineering	3,430
Life, Physical, and Social Science	2,177
Farming, Fishing, and Forestry	1,916
Legal	1,819

Total Employment: 270,564

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
Note: Blue shading indicates LQ over 1.00

SPOKANE MSA

Occupational Cluster: Share of Employment (%), 2019

Occupational Cluster	Share
Office and Administrative Support	15.0%
Sales and Related	10.0%
Food Preparation and Serving…	8.1%
Transportation and Material Moving	6.2%
Healthcare Practitioners and…	6.0%
Education, Training, and Library	5.6%
Personal Care and Service	5.2%
Business and Financial Operations	5.2%
Production	5.1%
Construction and Extraction	5.1%
Management	4.7%
Installation, Maintenance, and…	4.2%
Building and Grounds Cleaning…	4.1%
Healthcare Support	3.1%
Community and Social Service	2.4%
Protective Service	2.3%
Computer and Mathematical	2.2%
Arts, Design, Entertainment,…	2.0%
Architecture and Engineering	1.3%
Life, Physical, and Social Science	0.8%
Farming, Fishing, and Forestry	0.7%
Legal	0.7%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Occupational Cluster: 5-Year Employment Growth, 2014- 2019

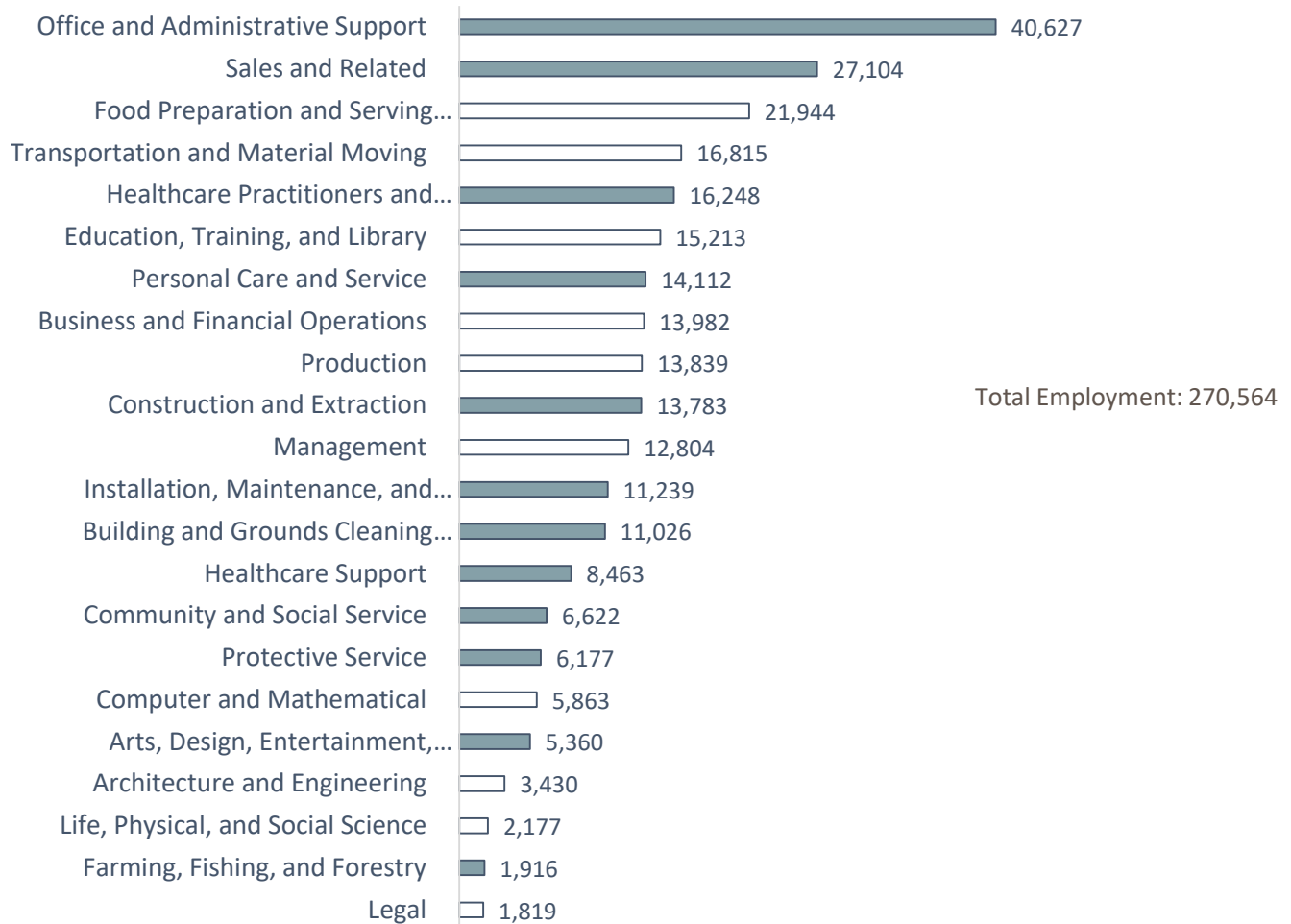| Occupational Cluster	Growth
Farming, Fishing, and Forestry	97.0%
Construction and Extraction	25.0%
Management	17.1%
Healthcare Practitioners and…	16.7%
Community and Social Service	15.8%
Business and Financial Operations	15.6%
Transportation and Material Moving	15.5%
Personal Care and Service	13.6%
Computer and Mathematical	13.4%
Arts, Design, Entertainment,…	12.8%
Installation, Maintenance, and…	12.5%
Food Preparation and Serving…	11.2%
Building and Grounds Cleaning…	9.1%
Legal	8.5%
Protective Service	7.9%
Architecture and Engineering	6.6%
Education, Training, and Library	6.3%
Life, Physical, and Social Science	6.1%
Production	6.0%
Office and Administrative Support	5.3%
Sales and Related	4.8%
Healthcare Support	1.6%

All Occupations: 10.8%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
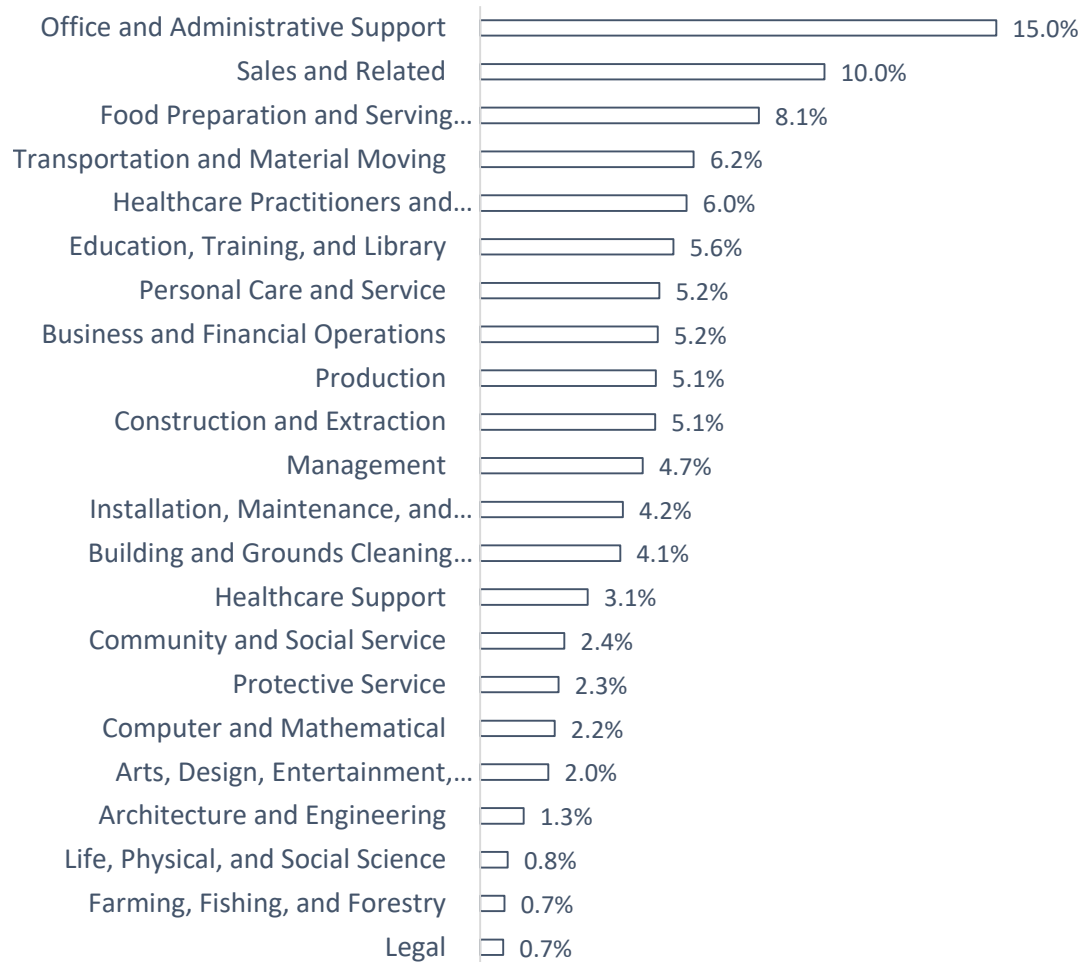
SPOKANE MSA

Occupational Cluster: 5-Year Employment Growth (New Jobs), 2014-2019

Occupational Cluster	New Jobs
Construction and Extraction	2,761
Healthcare Practitioners and...	2,323
Transportation and Material Moving	2,260
Food Preparation and Serving...	2,202
Office and Administrative Support	2,054
Business and Financial Operations	1,887
Management	1,866
Personal Care and Service	1,685
Installation, Maintenance, and...	1,248
Sales and Related	1,237
Farming, Fishing, and Forestry	944
Building and Grounds Cleaning...	923
Community and Social Service	905
Education, Training, and Library	895
Production	783
Computer and Mathematical	692
Arts, Design, Entertainment,...	609
Protective Service	452
Architecture and Engineering	211
Legal	142
Healthcare Support	137
Life, Physical, and Social Science	126

Total New Jobs: 26,342

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SPOKANE MSA

Occupational Cluster: 5-Year Employment Projection, 2019-2024

Occupational Cluster	Projection
Farming, Fishing, and Forestry	24.1%
Healthcare Support	11.6%
Community and Social Service	11.6%
Healthcare Practitioners and…	10.3%
Construction and Extraction	8.9%
Personal Care and Service	8.7%
Management	8.4%
Protective Service	7.4%
Building and Grounds Cleaning…	7.2%
Installation, Maintenance, and…	6.8%
Education, Training, and Library	6.7%
Computer and Mathematical	6.4%
Transportation and Material Moving	6.3%
Business and Financial Operations	6.2%
Life, Physical, and Social Science	5.9%
Food Preparation and Serving…	5.6%
Legal	5.3%
Architecture and Engineering	5.1%
Sales and Related	4.4%
Office and Administrative Support	4.0%
Arts, Design, Entertainment,…	3.4%
Production	2.1%

All Occupations: 6.5%

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SPOKANE MSA

Occupational Cluster: 5-Year Employment Projection (New Jobs), 2019-2024

Occupational Cluster	New Jobs
Healthcare Practitioners and…	1,667
Office and Administrative Support	1,641
Food Preparation and Serving…	1,224
Personal Care and Service	1,221
Construction and Extraction	1,220
Sales and Related	1,197
Management	1,070
Transportation and Material Moving	1,066
Education, Training, and Library	1,013
Healthcare Support	984
Business and Financial Operations	865
Building and Grounds Cleaning…	794
Community and Social Service	769
Installation, Maintenance, and…	767
Farming, Fishing, and Forestry	462
Protective Service	459
Computer and Mathematical	372
Production	292
Arts, Design, Entertainment,…	184
Architecture and Engineering	175
Life, Physical, and Social Science	129
Legal	97

Total New Jobs: 17,669

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Occupational Cluster: Projected Employment, 2024

Occupation	Employment
Office and Administrative Support	42,268
Sales and Related	28,302
Food Preparation and Serving…	23,168
Healthcare Practitioners and…	17,915
Transportation and Material Moving	17,881
Education, Training, and Library	16,227
Personal Care and Service	15,333
Construction and Extraction	15,003
Business and Financial Operations	14,847
Production	14,131
Management	13,874
Installation, Maintenance, and…	12,005
Building and Grounds Cleaning…	11,819
Healthcare Support	9,447
Community and Social Service	7,391
Protective Service	6,637
Computer and Mathematical	6,236
Arts, Design, Entertainment,…	5,544
Architecture and Engineering	3,605
Farming, Fishing, and Forestry	2,378
Life, Physical, and Social Science	2,306
Legal	1,916

Total Employment: 288,233

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Occupational Cluster: Projected Share of Employment, 2024

Occupational Cluster	Share
Office and Administrative Support	14.7%
Sales and Related	9.8%
Food Preparation and Serving…	8.0%
Healthcare Practitioners and…	6.2%
Transportation and Material Moving	6.2%
Education, Training, and Library	5.6%
Personal Care and Service	5.3%
Construction and Extraction	5.2%
Business and Financial Operations	5.2%
Production	4.9%
Management	4.8%
Installation, Maintenance, and…	4.2%
Building and Grounds Cleaning…	4.1%
Healthcare Support	3.3%
Community and Social Service	2.6%
Protective Service	2.3%
Computer and Mathematical	2.2%
Arts, Design, Entertainment,…	1.9%
Architecture and Engineering	1.3%
Farming, Fishing, and Forestry	0.8%
Life, Physical, and Social Science	0.8%
Legal	0.7%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

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SPOKANE MSA

Occupational Cluster: Average Annual Salary, 2019

Occupation	Salary
Management	$90,994
Architecture and Engineering	$70,860
Healthcare Practitioners and…	$70,746
Computer and Mathematical	$68,463
Legal	$66,699
Life, Physical, and Social Science	$63,667
Business and Financial Operations	$61,401
Education, Training, and Library	$49,362
Construction and Extraction	$49,076
Community and Social Service	$46,242
Installation, Maintenance, and…	$45,172
Protective Service	$44,056
Arts, Design, Entertainment,…	$41,433
Production	$37,271
Office and Administrative Support	$36,597
Transportation and Material Moving	$35,959
Farming, Fishing, and Forestry	$34,016
Healthcare Support	$33,219
Sales and Related	$30,985
Building and Grounds Cleaning…	$28,818
Personal Care and Service	$28,215
Food Preparation and Serving…	$25,648

All Occupations: $43,927

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Top 5 Occupational Clusters: LQ

Rank	Cluster	LQ	Share of Employment (%)	5-Year Growth, 2014-2019	Average Annual Salary
1	Community and Social Service	1.47	2.4%	15.8%	$46,242
2	Healthcare Support	1.13	3.1%	1.6%	$33,219
3	Farming, Fishing, and Forestry	1.13	0.7%	97.0%	$34,016
4	Personal Care and Service	1.13	5.2%	13.6%	$28,215
5	Building and Grounds Cleaning and Maintenance	1.12	4.1%	9.1%	$28,818

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Top 5 Occupational Clusters: Total Employment

Rank	Cluster	Total Employment	Share of Employment (%)	LQ	Average Annual Salary
1	Office and Administrative Support	40,627	15.0%	1.04	$36,597
2	Sales and Related	27,104	10.0%	1.02	$30,985
3	Food Preparation and Serving Related	21,944	8.1%	0.94	$25,648
4	Transportation and Material Moving	16,815	6.2%	0.90	$35,959
5	Healthcare Practitioners and Technical	16,248	6.0%	1.07	$70,746

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Top 5 Occupational Clusters: 5-Year Employment Growth, 2014-2019

Rank	Cluster	5-Year Growth	Share of Employment (%)	LQ	Average Annual Salary
1	Farming, Fishing, and Forestry	97.0%	0.7%	1.13	$34,016
2	Construction and Extraction	25.0%	5.1%	1.11	$49,076
3	Management	17.1%	4.7%	0.82	$90,994
4	Healthcare Practitioners and Technical	16.7%	6.0%	1.07	$70,746
5	Community and Social Service	15.8%	2.4%	1.47	$46,242

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Top 5 Occupational Clusters: 5-Year Employment Projection, 2014-2019

Rank	Cluster	5-Year Projection, 2019-2024	2024 Employment	Share of 2024 Employment	LQ
1	Farming, Fishing, and Forestry	24.1%	2,378	0.8%	1.13
2	Healthcare Support	11.6%	9,447	3.3%	1.13
3	Community and Social Service	11.6%	7,391	2.6%	1.47
4	Healthcare Practitioners and Technical	10.3%	17,915	6.2%	1.07
5	Construction and Extraction	8.9%	15,003	5.2%	1.11

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Top 5 Occupational Clusters: Average Annual Cluster

Rank	Cluster	Average Annual Salary	LQ	Share of Employment	5-Year Growth, 2014-2019
1	Management	$90,994	0.82	4.8%	17.1%
2	Architecture and Engineering	$70,860	0.73	1.3%	6.6%
3	Healthcare Practitioners and Technical	$70,746	1.07	6.2%	16.7%
4	Computer and Mathematical	$68,463	0.71	2.2%	13.4%
5	Legal	$66,699	0.81	0.7%	8.5%

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Service Sector	1.06	125,050	46.2%	7.5%	5.9%	$28,740
Working Sector	1.00	66,701	24.7%	13.6%	6.2%	$46,182
Knowledge Sector	0.94	76,897	28.6%	12.8%	7.2%	$65,960

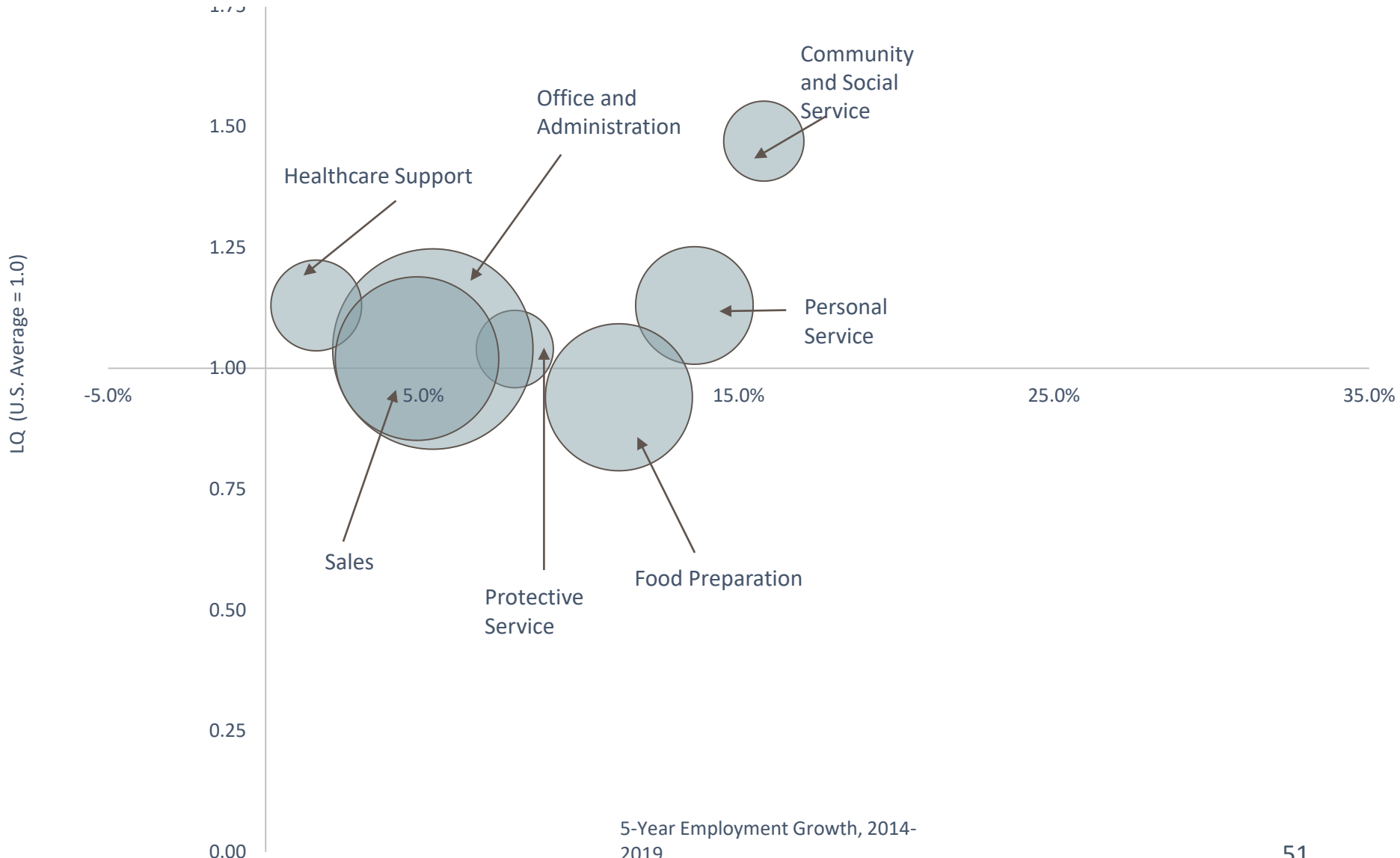Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA
Sector

Size of Bubble = Total Employment

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

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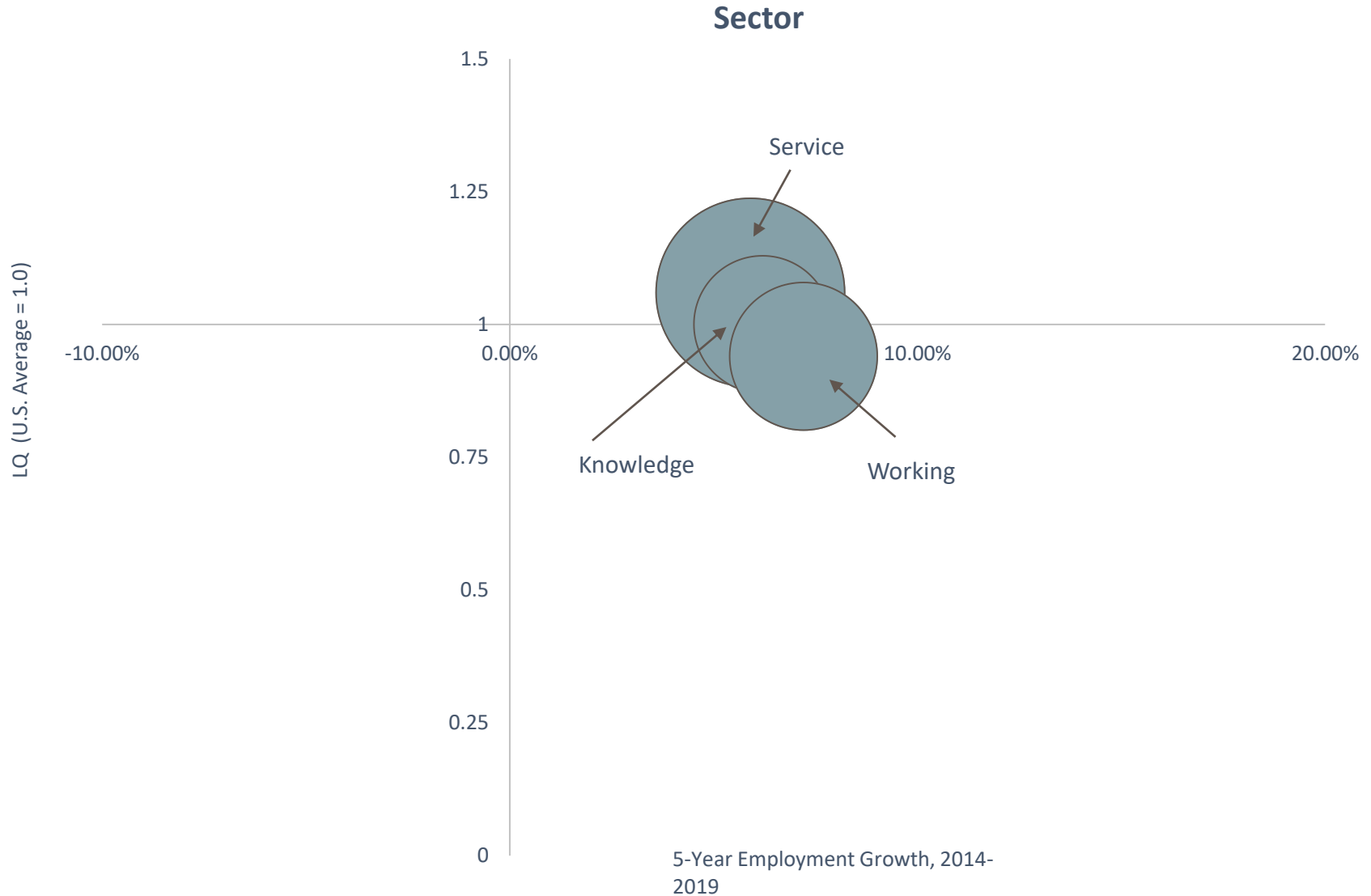
SPOKANE MSA

Knowledge Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Healthcare Practitioners and Technical	1.07	16,248	6.2%	16.7%	10.3%	$70,746
Arts, Design, Entertainment, Sports, and Media	1.05	5,360	1.9%	12.8%	3.4%	$41,433
Education, Training, and Library	0.99	15,213	5.6%	6.3%	6.7%	$49,362
Business and Financial Operations	0.96	13,982	5.2%	15.6%	6.2%	$61,401
Life, Physical, and Social Science	0.96	2,177	0.8%	6.1%	5.9%	$63,667
Management	0.82	12,804	4.8%	17.1%	8.4%	$90,994
Legal	0.81	1,819	0.7%	8.5%	5.3%	$66,699
Architecture and Engineering	0.73	3,430	1.3%	6.6%	5.1%	$70,860
Computer and Mathematical	0.71	5,863	2.2%	13.4%	6.4%	$68,463
Knowledge Sector	**0.94**	**76,897**	**28.6%**	**12.8%**	**7.2%**	**$65,960**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA

Knowledge Sector

Size of Bubble = Total Employment

LQ (U.S. Average = 1.0)

5-Year Employment Growth, 2014-2019

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed
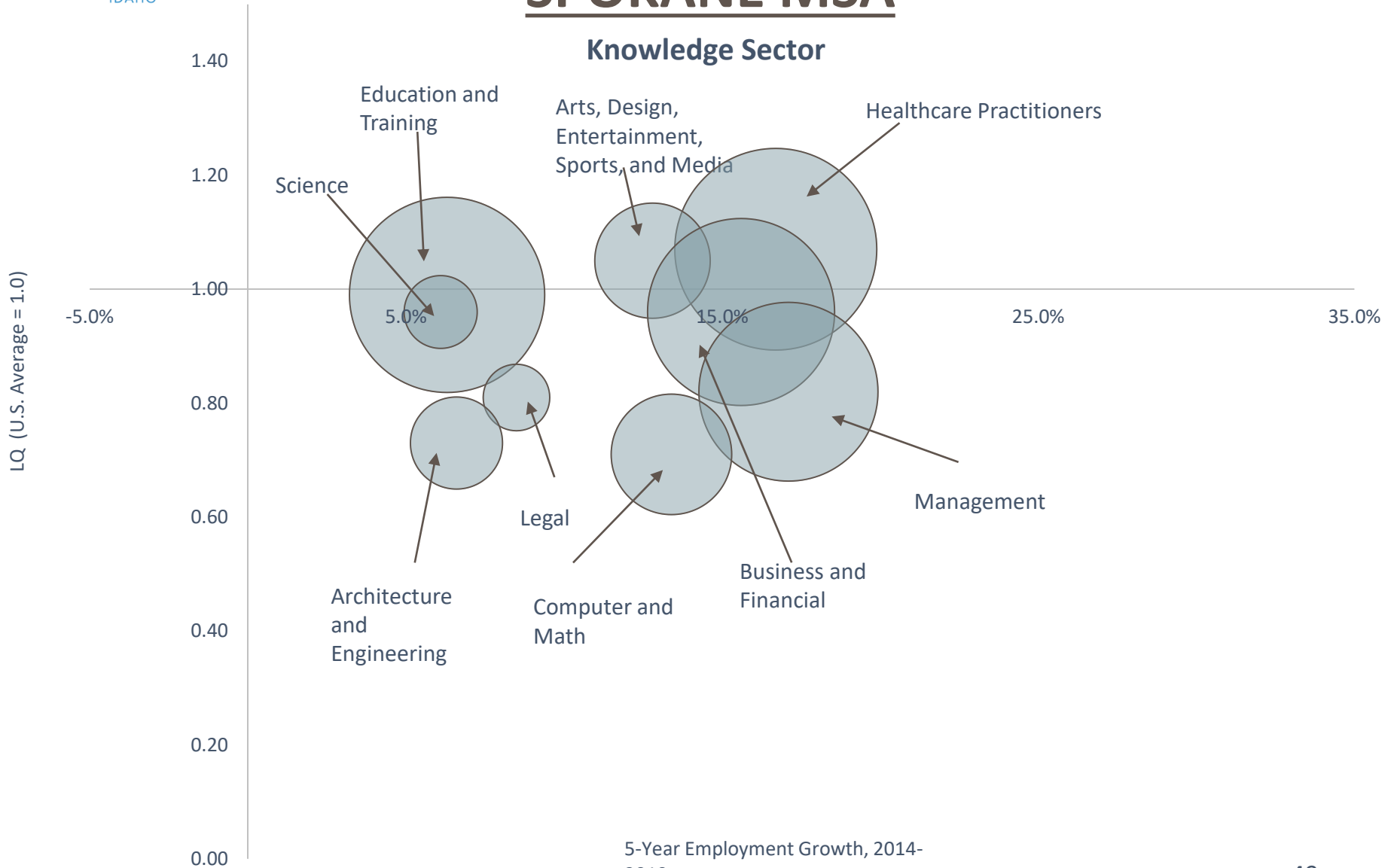
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SPOKANE MSA

Service Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Community and Social Service	1.47	6,622	2.4%	15.8%	11.6%	$46,242
Protective Service	1.04	6,177	2.3%	7.9%	7.4%	$44,056
Office and Administrative Support	1.04	40,627	15.0%	5.3%	4.0%	$36,597
Healthcare Support	1.13	8,463	3.1%	1.6%	11.6%	$33,219
Sales and Related	1.02	27,104	10.0%	4.8%	4.4%	$30,985
Personal Care and Service	1.13	14,112	5.2%	13.6%	8.7%	$28,215
Food Preparation and Serving Related	0.94	21,944	8.1%	11.2%	5.6%	$25,648
Service Sector	**1.06**	**125,050**	**46.2%**	**7.5%**	**5.9%**	**$28,740**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA
Service Sector

Size of Bubble = Total Employment

Community and Social Service

Office and Administration

Healthcare Support

Personal Service

LQ (U.S. Average = 1.0)

-5.0%   5.0%   15.0%   25.0%   35.0%

1.75
1.50
1.25
1.00
0.75
0.50
0.25
0.00

Sales

Protective Service

Food Preparation

5-Year Employment Growth, 2014-2019

51

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

SPOKANE MSA
Working Sector

Cluster	LQ	Employment	Share of Employment (%)	5-Year Growth, 2014-2019	5-Year Projection, 2019-2024	Average Annual Salary
Building and Grounds Cleaning and Maintenance	1.12	11,026	4.1%	9.1%	7.2%	$28,818
Construction and Extraction	1.11	13,783	5.1%	25.0%	8.9%	$49,076
Installation, Maintenance, and Repair	1.06	11,239	4.2%	12.5%	6.8%	$45,172
Transportation and Material Moving	0.90	16,815	6.2%	15.5%	6.3%	$35,959
Production	0.88	13,839	5.1%	6.0%	2.1%	$37,271
Working Sector	**1.00**	**66,701**	**24.7%**	**13.6%**	**6.2%**	**$46,182**

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

Size of Bubble = Total Employment

Working Sector

LQ (U.S. Average = 1.0)

1.50

1.25

Building and Grounds Cleaning

Installation and Repair

Construction

1.00

-5.0%   5.0%   15.0%   25.0%   35.0%

0.75

Transportation

0.50

Production

0.25

0.00

5-Year Employment Growth, 2014-2019

Source: EMSI 2019.3 – QCEW Employees, Non-QCEW Employees, and Self-Employed

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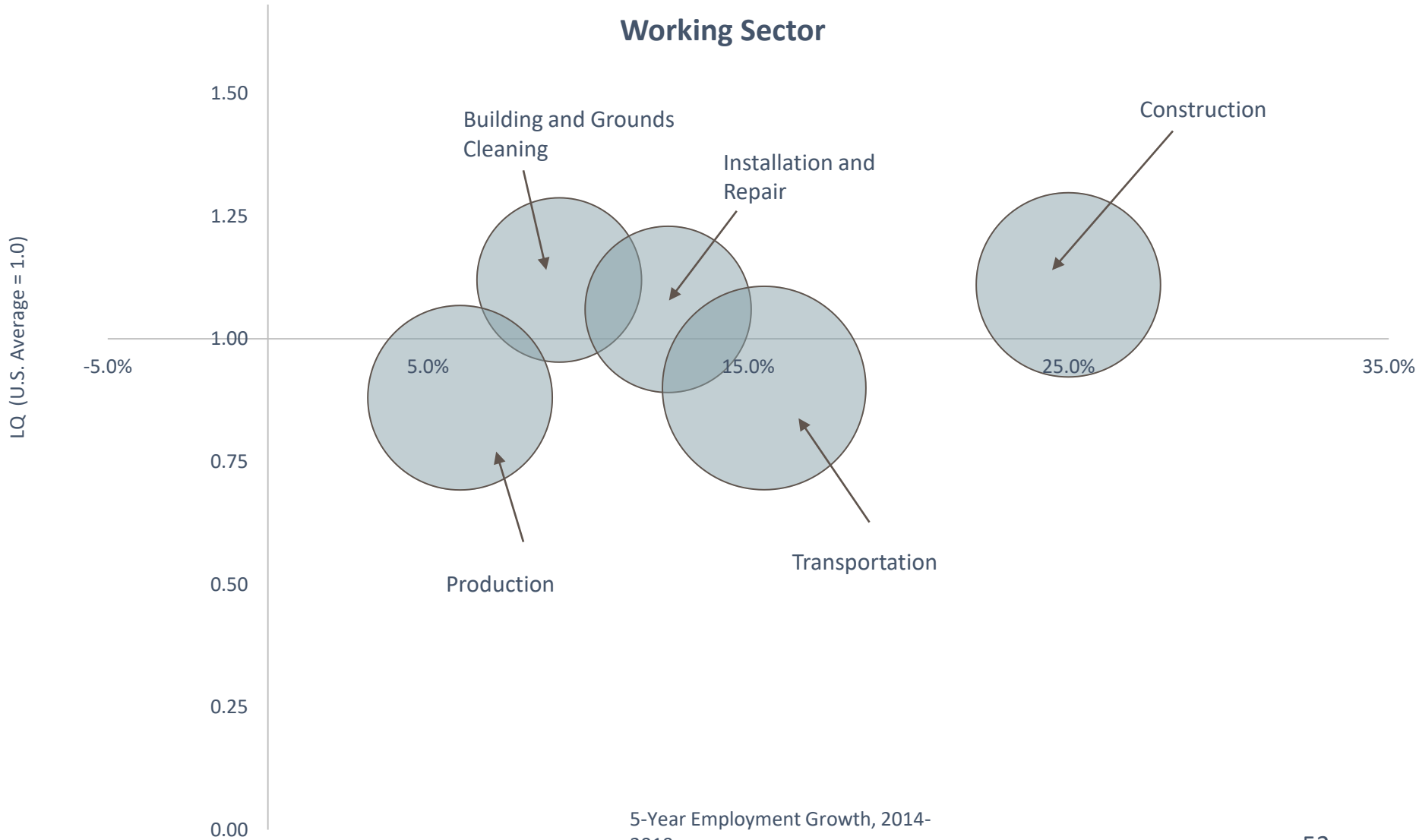
ATTACHMENT D: Stakeholder Summary

B Bridge Economic Development

Memorandum

Date	October 3, 2019
To	Sean Holm, City of CdA
	Nicole Kahler, CDA 2030
From	Alisa Pyszka, Bridge Economic Development
	Alex Dupey, MIG
Subject	Roundtable Meetings Summary
Project	Envision Coeur d'Alene

ROUNDTABLE SUMMARY

The following information is a summary of feedback from participants in the focused roundtable meetings and Citizen Advisory Committee (CAC) during September 25-26, 2019. All comments are anonymous and are intended to supplement the quantitative data analysis.

City Staff

- Historically a timber community, but has become a destination community since the construction of the Resort in the 1980s. We would now like to go beyond tourism.
- CdA EDC originally just focused on new company recruitment. Has expanded that focus to include business retention and expansion (BRE).
  - TDS-will provide free fiber optics, but wanted some incentives back. Did not provide incentives it but they are still located here. Proves the desire for companies to locate here.
- North Idaho College is focused on economic gardening. Innovation Den is an important physical space for startups to gather.
- City's role in economic development has been site readiness, infrastructure and proactive culture of permitting. City staff will come together during a preliminary concept of a project for initial review with no fees.
  - With the East Sherman redevelopment plan city is applying strengths in matchmaking between properties/buildings and tenants.
  - Area could see more investment if a BID was in place similar to downtown.
- City now owns Atlas Mill (now a URD)
- Creating a new URD near the hospital
- Don't have an ec/dev department. Strong partnerships. City's role is to facilitate infrastructure/zoning.
- Sales tax dispersed on population and assessment. Communities don't spend energy vying for retail businesses.

- Area is being more strategic in how to target clusters
- CDA 2030-Advocacy. Soft skills. Pushing for living wage jobs, daycare
    - Neutral convener
    - Long-term perspective
    - Great health care here but we can't get into see the doctors

- Hard for retailers to make it year-round. City is extremely busy for approximately three summer months

Infrastructure

- Water
    - Working off of master plan
    - Able to service development
    - 500 acres on the west of the City-can supply it
    - Water is not an issue
- Streets
    - Deferred maintenance but we're catching up.
- Stormwater
    - Anything south of I-90 is going to the River or lake
    - North of I-90, treated in swales
- In process of installing some smart traffic signals
- Transit/bikes
    - Less than mediocre – loop system which is very inefficient
    - Multiple funding sources for transit and free
    - Adding bike lanes (miles per year)-seasonal
    - Not a big issue for new businesses, but does come up with affordable housing grants.

- Would like to focus on "Year around community"- foster a sense of community

- As this plan evolves, consider "who are you investing in?"

Economic Development Partners

- NIC Small business Center: Education/coaching for small and medium-sized businesses.
- Exit/succession plans
- Work with service industries a lot, then light manufacturing. Technology sector is growing
    - Getting ready to open a rapid prototyping lab in the Headland Building
- Tech sector is growing. Working remotely from CdA or starting a business
    - Computer science degree just getting started at U of I
    - Strong focus on robotics and artificial intelligence. Masters and PhD students coming up
- Started a community makers space (k-12) in technology. Located on NIC Campus. Includes professional development for kids

- - o Rapid prototyping and maker space (Gizmo) are adjacent to one another.
    - o Community members are using the site (e.g. continuous composites)
      - ▪ XCraft and Computer Science program are in the basement of the Innovation Den.
- Heard that we really need data systems and data science
- AVISTA did a study looking at the Idaho side of the health care-focused on possibility of data science
- All classes have advisory committee members from local business community.
- Dual credit courses available (high school students earning college credit)
- Lots of non-credit related courses (nurse assistants, plumbing, electrical, welding etc.)
  - o Designed to respond to business needs.
  - o Use federally funded on-the-job training
- Workforce co-op for coding (Charles' group)
- Biggest challenge is lack of talent and opportunities to attract people.
- Innovation Den has done a good job connecting people, but only for small shops. Not bigger players.
- Technology industry is not collaborative here. Very siloed due to competition for talent.
- Pitch event is largely a twice a month coffee and concept meeting at Innovation Den.
- WA-too expensive and regulated. Come to Idaho where land is cheaper
- EDC is a great board and has a diverse group of people.
- Milken named CdA the fifth most innovative small town
- Innovation Collective started by Nick Smoot, Cody Peterson, Rich Thrasher
- 5-10,000 sq ft space is needed. Smaller spaces are ok. Once companies start to grow they have a hard time finding space.
- Rural access to high speed internet is a problem
- Need to engage folks who come here periodically-get past the fear/irritation of part-time residents.
- There is a lack of awareness of good jobs here. Need to promote companies and opportunities to attract talent.
- NIC is seeing a declining enrollment in credit courses. Hard for students to live here due to affordable housing issues.
- Sam Wolkenhauer, Northern Regional Economist is a good resource for additional information.

CdA EDC

- CdA has limited industrial land. Post Falls has about 600 acres of industrial land
- Bigger buildings are located out in the Prairie
- Continuous Composites-wants to stay, but needs the right space.
  - o Sales force mostly engineering
  - o Want to be in CdA because the talent is here
  - o CdA is great for hosting clients

- Chief Architect is located here with about 80 employees.
- Professional services/engineering/aerospace is a large focus
    - I-90 aerospace conference has been successful. Want to bring more companies here to localize the supply chain
- Companies don't have enough talent
- If they don't come here, they go to Washington or Oregon. If they don't come here it is because of limited talent pool. Challenging with 2.7% unemployment rate.
- Washington and CA companies calling
- Starting to look at a talent attraction committee. Focus on
    - Veterans
    - High school students (Go On initiative)
    - Kootenai County Young Professionals – attract millennials.
- Would like to tap into retiring community – part time hours but with significant experience.
- Higher wages in Spokane have required some businesses like healthcare pay competitive wages in CdA
- There is a lack of branding in marketing ec/dev. Should be EDC. We have jobs-people need to know about them. Working on listing jobs in a consistent fashion.
- We partner with the City and CDA 2030 in a lot of ways. Once we have the action items, we'll engage with all of the cities on implementation.
- Need to promote locally-grown businesses through EDC and communities. Rocky Mountain Construction is a good example: article about them in USA but very important to receive recognition locally.

CAC

- Would like to see the industries that create the different sectors split out.
- Concerned that housing numbers are not most current.
- Would like to give feedback on data as there may be large employers skewing some of the data points.

Downtown Partners and Developers

- Parking is the biggest issue for businesses. If you can't park in the front, locals will move on
- Competing with Amazon. Not against chain stores, just asking that people consider local first.
- "Commit to 1 percent" shopping local. Will provide video of the strengths and weaknesses of CdA. Mayors are concerned about growth and recession
- Focused outreach to increase confidence in the local economy. Need people to understand why they should participate in a recession.
- Need to get some housing downtown. Current housing costs downtown are not accessible to most people

- Land costs are cheaper elsewhere in the city than downtown which is why it's happening up north.
- Parking and ground floor retail requirements are killing projects.
- Midtown is a good example of the community opposition. People don't want "Section 8" housing. Don't' understand concept of affordable/workforce housing.
- If building downtown, would be 5-story wood frame to make it pencil. Need to provide surface parking
- Affordability is becoming an issue. People living here are being priced out because of property tax increases
- Continuing to add parks is great but maintenance is becoming an issue-where do you focus your money? Who are the parks for?
- C-17, allows you to do anything
- State of Idaho is a becoming a retiree refuge. Some homes are going to local retirees looking to downsize.
- Younger families are coming Downtown businesses. Going to the park and then walking to the shops/restaurants.
- New parking structure has encouraged development.
- Downtown Association: events, marketing, parking management, clean and safe etc.
- Seeing more foot traffic on 4th and 3rd
- Hospital district URA is where new investment will go. New master plan will be available soon.
- Midtown has good potential.
- Low vacancy rate downtown. Average retail rental price downtown is $2.00/sq foot. Sometimes property owners let retail rent laps in shoulder tourist seasons because there is such limited business.

High-Tech Business Leaders

1. What makes Coeur d'Alene unique for business?
   a. *CDA is a beautiful place to live with a special culture focused on the community. Especially for the tech industry, the cost of living is low for a beautiful place to live. Because of the people we attract, our internal company reflects the broader culture of the city.*
2. What are barriers to growth?
   a. *We lack a degree of tech focus and infrastructure in the city. We have companies like ours, an autonomous yacht company (Qurrent), bread making robots, carbon fiber printing companies, drone companies, but most people do not even realize because we have no collective technology identify within Coeur d'Alene. To outsiders (especially talent in Spokane!), we lack professional opportunities, but they are here!*
3. Missed opportunities to consider?
   a. *CDA can become a mini Silicon Valley with the proper focus – we can attract world class talent because of the quality of life here and positively impact our local economy if we promote and invest in the tech community*
4. Where does your talent typically come from?

a. *Local engineering schools, but much of it is just finding smart people and growing them internally no matter what their background is. It takes investment, but it's worth it and helps retain that talent.*
5. Is it difficult to recruit and/or retain?
    a. *Difficult to recruit (we lack quantity of engineers that are open to staying in CDA and are a culture fit), easy to retain – this is one of CDA's competitive advantages. Retention is easy because of quality of life, but finding the engineering talent that has an innovative attitude is difficult.*
6. How is the quality of infrastructure, transportation, site availability for industry growth?
    a. *We have a lot of great developments in the area focused on medical offices, banks and apartments, but we lack a tech hub. For example, we are looking for a beautiful new office space to bring customers and show off our city as well as our game-changing technology.*

Couple of thoughts:

- The newspaper which is a customer so I want to be respectful of this, but we just raised $36M in a equity round last month and our local newspaper (CDA PRESS) didn't even cover the story. Note the Spokane papers that were all over it and the Journal of Business in Spokane put us on the front page, what happened to the business section?
- Need more of CDA business community leadership group, not the Chamber which I love but group of successful business people that can drive efforts
- Old school, from an outsiders prospective there is a group of old time business people and they want nothing to do with outsiders unless it helps them. Just saying.

STAKEHOLDERS

Hillary Andersson, City of CdA
Kyle Marize, City of CdA
Sean Holm, City of CdA
Chris Bosley, City of CdA
Troy Tymesen, City of CdA
Renata McLeod, City of CdA
Nicole Kahler, CDA 2030
Marie Nail, CDA 2030
Sue Shelby, North Idaho College (NIC)
Charles Buck, University of Idaho
Warren Mueller, NIC
Vicki Isaleson, NIC
Gynii Gillian, CdA EDC
Dennis Cunningham, Active West

Emily Boyd, Downtown Business Association
Niels Johansen, Heart of Businesses
Tony Berns, Ignite